

State Vehicle Fleet Management Plan

Executive Summary

House Bill 3125, 76th Legislature, mandates the Office of Vehicle Fleet Management (OVFM) of the General Services Commission (GSC), as directed by the State Council on Competitive Government (CCG), to develop a management plan for the state fleet. This plan is to provide detailed recommendations for improving administration and operation of the state's vehicle fleet.

This State Vehicle Fleet Management Plan (the Plan) addresses each component specified in HB 3125 and provides additional direction to implement the provisions of the bill.

Required Plan Components:

- 1. Opportunities for consolidating and privatizing the operation and management of vehicle fleets in areas where there is a concentration of state agencies, including the Capitol Complex and the Health and Human Services Complex in Austin.**

While opportunities for fleet consolidations within the state exist, analysis indicates that it is not cost-effective to do so at this time.

- 2. The number and type of vehicles owned by each agency and the purpose each vehicle serves.**

The State Vehicle Fleet Management Plan adopted by the CCG on May 24, 2000 included a table with the number and type of vehicles owned by each agency as of August 31, 1999. Information that was reported for some agencies contained errors in the reporting and data collection. The Plan will address fleet reporting requirements and eliminate future reporting errors.

- 3. Procedures to increase vehicle use and improve the efficiency of the state vehicle fleet.**

The Plan includes statewide policies and goal statements to address these aims, including:

State Fleet Minimum Use Criteria (p. 7); and
State Fleet Consolidation Policy (p. 9).

See Chapter Two for additional policies and procedures.

- 4. Procedures to reduce the cost of maintaining state vehicles.**

The Plan includes policies and procedures for reducing the cost of maintaining state vehicles in Chapter Two. Specific savings are found in State Vehicle Replacement Goals (p. 5) and State Fleet Fueling Policy (p. 6).

- 5. Sale of excess state vehicles.**

Chapter One and Chapter Three provide procedures for the sale of vehicles identified as excess.

- 6. Lower-cost alternatives to using state-owned vehicles, including:**

- a. Using rental cars, and**
- b. Reimbursing employees for using personal vehicles.**

Accurate cost data to allow comparison of possible lower-cost alternatives to the use of state-owned vehicles, such as the use or rental cars or reimbursing employees for the use of personal vehicles, currently does not exist. However, the Plan includes components that will generate data for this purpose. OVFM will review available data by September 1, 2002, and make further recommendations to CCG by February 28, 2003.

Additional Non-statutory Plan Components:

7. Data Collection

Fleet data reporting requirements for all state agencies and institutions of higher education are listed in Chapter Five and Appendix A. OVFM has also documented the need for a new fleet data system using Internet-based technology that will allow for more timely and accurate reports. Additional data elements will be collected once systems development is completed.

8. Specify Current Fleet Management “Best Practices”

Chapter Six contains current government and private sector fleet “Best Practices.” These are intended to increase state vehicle use and efficiency and to reduce maintenance and operating costs for state vehicles. State fleet managers should emulate and adopt the practices when feasible.

9. Notification of Rules Requirements

The CCG will notify state agencies of requirements under HB 3125 to adopt rules or policies and procedures consistent with and to implement the expanded state vehicle fleet management plan.

10. Determination of Eligible Vehicles

Since establishment of a Capitol Complex vehicle fleet is deemed not cost-effective at this time, no vehicles or titles will be transferred to OVFM. A proposal for establishing a Capitol Complex fleet with estimated associated costs will be provided to the Governor and Legislature in January 2001.

11. Vehicle Purchasing Restrictions Remain in Force

The vehicle purchasing moratorium imposed by House Bill 3125 will be lifted for agencies and institutions as soon as agencies adopt rules and institutions of higher education adopt policies or procedures to implement the Plan and they are reviewed and approved by OVFM. Agencies/institutions shall adopt rules or policies to implement the Plan no later than February 28, 2001.

12. Vehicles Purchased with Institutional Funds

For institutions of higher education, the determination and disposal of excess vehicles, the determination of fleet size, minimum use criteria, and the state fleet consolidation requirement applies only to vehicles purchased with appropriated funds.

13. Law Enforcement Vehicles

Vehicles used for law enforcement purposes, including pursuit vehicles, are required to adhere to all data collection and agency reporting requirements specified in Chapter Five and Appendix A of the Plan; however, law enforcement and pursuit vehicles are exempt from all other plan requirements.

Chapter One: Fleet Consolidation Opportunities

Preliminary analysis indicated several opportunities to consolidate state vehicle fleets. However, additional review of consolidating and privatizing state vehicles in the Capitol Complex and the Health and Human Services Complex indicates that the State cannot operate a self-supporting consolidated operation on a total cost recovery basis.

Due to the age of the state fleet, pool vehicles obtained from agencies in Travis County generally would be older models at the end of their useful life. Consequently, the State would not be able to operate a consolidated motor pool without a significant initial capital outlay and subsequent annual appropriations. Additionally, a management structure does not exist to oversee a consolidated motor pool and would have to be developed. As a result, a state-run consolidated motor pool could not operate on a cost recovery basis and be competitive with the private sector.

Data currently do not exist to compare costs associated with motor pools currently operated by state agencies and institutions with private rental/leasing operations. Data collected as a result of the Plan will allow for a cost comparison to be performed. GSC, under the direction of the CCG, will perform a cost comparison of state agency motor pools and private rental/leasing operations by September 1, 2002.

I. IMMEDIATE REVIEW OF TRAVIS COUNTY INDIVIDUAL AGENCY POOLED VEHICLES

Although a Capitol Complex and Health and Human Services Complex consolidated fleet may not be cost-effective at this time, opportunities exist to increase the overall use of agency pooled vehicles in Travis County. Beginning September 1, 2000, OVFM will review agency pooled vehicles located in Travis County and apply minimum use criteria. Vehicles deemed underused according to this review shall be identified as excess. By February 28, 2001, OVFM will notify each agency and the CCG which agency vehicles in Travis County are deemed excess. After OVFM notifies an agency that it must dispose of a vehicle, the decision of which vehicle to surplus is left to the agency.

The Comptroller's office will allocate two staff members to work with OVFM and the CCG on this review.

II. DISPOSING OF IDENTIFIED EXCESS POOLABLE VEHICLES

State agencies and institutions must dispose of identified excess pooled vehicles by August 31, 2001. Agencies and institutions may dispose of vehicles through the GSC Surplus Property Division's process (advertising to eligible entities, then sealed bids or auction) or through other approved surplus property disposal processes (for agencies not subject to Chapter V.T.C.A., Government Code, 2175).

To meet the August 31, 2001 deadline, agencies and institutions will need to surplus identified excess vehicles as quickly as possible. To use the GSC sealed bid process, agencies and institutions must list vehicles as surplus in State Property Accounting (SPA) no later than April 13, 2001. GSC has sealed bids every month; therefore, vehicles may be listed well in advance of the April 13, 2001 deadline.

To be disposed of through the GSC state auction process, vehicles must be listed as surplus in the SPA system by the deadlines shown below:

Deadline for Coding as For Inclusion in Disposal Method 05 in SPA	Tentative Auction Date
October 13, 2000	February 10, 2001
January 15, 2001	April 28, 2001
April 13, 2001	August 4, 2001

Agencies must certify successful disposal of identified excess vehicles to OVFM by August 31, 2001. Acceptable documentation includes the *Report on Sale of State Property* for sealed bid sales or the *Recap of Awarded Bidders* for auction sales.

Chapter Two: Procedures to Increase Vehicle Use, Improve Efficiency of the State Fleet and Reduce the Cost of Maintaining State Vehicles

All state agencies and institutions must adopt the following policies by February 28, 2001. Based on identified "Best Practices" within the government and private sector, these policies should increase vehicle use, improve fleet efficiency and reduce maintenance costs.

Agencies and institutions are encouraged to adopt practices specific to their fleets. Policies and procedures adopted in addition to these must be consistent with the requirements of the Plan.

OVFM will review all required policies and procedures identified in this Plan at least every two years and make recommendations for any changes to the CCG. Additionally, OVFM periodically may issue additional practices for implementation by state agencies and institutions.

I. STATE FLEET VEHICLE REPLACEMENT GOALS

The following guidelines provide minimum replacement goals for routine vehicle replacement. Attainment of these goals should minimize fleet capital and operating costs.

In general, most vehicles should be replaced when they reach 6 years (72 months) of service or 100,000 miles, whichever comes first. However, there may be circumstances in which vehicles may be replaced sooner (such as excessive maintenance or repair costs) or retained longer (such as unusually low maintenance costs). Fleet managers may make this determination on a case-by-case basis, using these guidelines as a starting point in their deliberations.

The following table details the specific replacement goals for different types of vehicles and vehicle uses:

Vehicle Type	Purpose	Replacement Goals	
		Age	or Mileage
Sedans and wagons	Staff or client transport	6 years	90,000 miles
Light trucks and Sport Utility Vehicles (SUVs) (8,600 GVWR or below)	Basic transport, light hauling	6 years	100,000 miles
Passenger vans	Staff or client transport	6 years	100,000 miles
Cargo vans	Cargo hauling	8 years	100,000 miles

Specialized equipment, such as heavy highway construction equipment, may not fall under any of the above categories. Such equipment may be considered for replacement according to other criteria, such as hours in service.

The Texas Department of Transportation's equipment replacement model (TxDOT Equipment Replacement Model, or TERM) may be used in lieu of these guidelines for any or all vehicle replacement decisions.

Sources for vehicle replacement goals:

Automotive Fleet, May 2000, p. 38: "Most Cited Written Replacement Policies"
Vehicle Remarketing Directory, p. 90: "Utility and Public Service Fleets Have Longest Lifecycles"
State of Oregon Vehicle Replacement Statement
State of Washington Vehicle Replacement Cycle
General Services Administration Greater Southwestern & Rocky Mountain Regional Bulletin, Oct. 1, 1996
Transportation Consultants, Inc., "State of Texas Report on Statewide Fleet Management," 3/8/00, p. 17
Texas Department of Criminal Justice Policy # 03.06, 10/22/97
Railroad Commission of Texas Vehicle Replacement Policy, p. 12, "Guidelines, Vehicle Operation"
General Services Commission Vehicle Replacement Policy SS-66.8 9/30/98
Texas Department of Transportation Equipment Replacement Model (TERM)

II. STATE FLEET FUELING POLICY

1. **Mandatory use of state retail fuel contracts.** Statewide contracts for retail fuel dispensing services were established in 1995 with multiple vendors. These contracts (established by the CCG) remain in place, and agencies are required to use one or more of the contracted vendor cards. To the degree possible, fuel cards should be issued for specific vehicles, not for individual drivers. This will allow for fuel cost monitoring for specific vehicles. Exceptions to the use of retail state fuel contracts require a waiver from the OVFM.
2. **Use of regular unleaded gasoline.** Unless specifically prohibited by manufacturer warranty or recommendations, all state vehicles operating on gasoline shall use regular unleaded gasoline. Higher octane blends (marketed as premium, super-unleaded, plus, etc.) reportedly offer no proven benefit and are prohibited for use in state vehicles (except as noted).
3. **Use of alternative fuels.** Vehicles capable of using alternative fuels will use them exclusively except in certain cases specified in Title 1, Texas Administrative Code, Chapter 125, Section 125.69. Exceptions are:
 - (A) where and when the alternative fuel is not available;
 - (B) the range of the alternative fuel is insufficient to complete a round trip, in which case the alternative fuel shall be used until exhausted, with conventional gasoline or diesel fuel used only to complete the trip or until the alternative fuel is available;
 - (C) when the alternative fuel costs more than conventional gasoline or diesel;
 - (D) when conversion equipment is not working or is unsafe to operate, in which case timely repairs or inspections shall be made so that the vehicle may continue to operate on the alternative fuel; and
 - (E) when operating exclusively on an alternative fuel is contrary to the vehicle manufacturer or alternative fuel conversion equipment vendor recommendations.
4. **Refueling at self-service islands or central fueling facilities only.** State and institution employees will use self-service islands when refueling at retail fueling stations.

III. STATE FLEET MINIMUM USE CRITERIA

The Office of Vehicle Fleet Management (OVFM) will develop and distribute, beginning October 30, 2001, agency-specific quarterly (or semi-annual, as appropriate) reports (based on reported fleet data) identifying vehicles that have accumulated less than the minimum mileage for the past three months of operation. The minimum mileage criteria will be increased over a three-year period beginning September 1, 2000. The criteria will be as follows:

- Sept. 1, 2000 – Aug. 31, 2001:
1,750 miles every 3 months (7,000 annual miles)
- Sept. 1, 2001 – Aug. 31, 2002:
2,250 miles every 3 months (9,000 annual miles)
- Sept. 1, 2002 – Aug. 31, 2003:
2,750 miles every 3 months (11,000 annual miles)

OVFM shall establish other suitable minimum use criteria with specific agencies or institutions when appropriate.

The following vehicles are exempt from this process:

- Vehicles with a manufacturer's Gross Vehicle Weight Rating (GVWR) of more than 8,600 pounds; and
- Vehicles purchased with non-appropriated funds or vehicles purchased with federal funds for specific federal projects.

Agencies and institutions will have 30 days from the quarterly (or semi-annual) OVFM report date to submit written justification for retaining those vehicles identified as failing to meet minimum mileage criteria. Extensions may be granted by OVFM for agencies required to justify large numbers of vehicles. Justification information that agencies may submit for OVFM review includes, but is not limited to:

- How does the vehicle help accomplish the mission of the agency? What services are provided with the vehicle? What is the core function of the vehicle and how does this relate to the core function of the agency?
- If the vehicle is campus-based or used primarily in a confined area, how many trips per day or days per month is the vehicle used? How many passengers per month are carried?
- What is the cost to rent or lease a comparable vehicle for the same number of days or trips compared to the cost of ownership?

OVFM will provide waivers for specific time periods for individual vehicles based on OVFM's agreement with and acceptance of the justification information submitted by an agency or institution. No waivers will be granted for vehicles designated as poolable that do not meet the minimum use criteria.

OVFM may grant a lifetime waiver to a vehicle that is deemed so unique in its function or design that an agency is unable to use the vehicle for any other purpose or to rotate the vehicle within the fleet.

If OVFM does not agree with an agency or institution's justification, it will provide the agency and CCG written documentation stating the agency/institution name, vehicle identification number, license plate, year, make, model, and reason for the waiver denial.

The agency/institution will have six months from the notification date to increase vehicle use to meet the minimum mileage criteria. If at the end of this six-month period, the vehicle in question still does not meet

minimum mileage criteria, OVFM will identify the vehicle as excess and notify both the agency/institution and the CCG. Vehicles identified as excess will be prepared for sale as specified in this Plan. Funds from the sale of these vehicles will be deposited in the individual agency accounts used to purchase the vehicles, as specified by House Bill 3125.

IV. STATE FLEET MANAGEMENT RESPONSIBILITY POLICY

Agency and University Responsibilities

Each state agency and institution shall appoint and maintain an individual specifically responsible for management of its fleet. This may be a part-time or full-time position, depending upon the size and complexity of the fleet to be managed. This position may be a manager of a department dedicated to fleet management or a single individual with fleet management responsibilities.

This position shall be empowered, with executive approval, to make all fleet management decisions within OVFM guidelines, including, but not limited to:

- vehicle purchasing decisions;
- vehicle replacement decisions;
- maintenance decisions;
- repair decisions;
- vehicle assignment and use decisions;
- disposal decisions; and
- review reported inappropriate use of state vehicles.

Each agency or university head is responsible for ensuring that the fleet manager is supported in implementing and enforcing the Plan.

This position shall be the central point of contact with the OVFM and is responsible for reporting vehicle use data, responding to queries about the agency's fleet, preparing waiver requests, and conducting any other business with OVFM.

This position will also be responsible for observing and enforcing statewide fleet management policies and procedures at the agency level.

Office of Vehicle Fleet Management Responsibilities

OVFM will:

- collect and analyze essential fleet data;
- create and implement the CCG state fleet management plan;
- set, implement and enforce state fleet policies;
- provide standardized fleet reports to agencies;
- within capabilities, offer direct and contracted support for repair and maintenance of vehicles in Travis County;
- promote and develop statewide contracts for repair and maintenance;
- offer fleet management support through publications, Web sites, meetings and other forms of communication, as needed
- serve as liaison between the GSC Purchasing Division and state agencies or institutions to ensure that state contracts for fleet functions are maintained and promoted, and
- implement the Plan using currently allocated full-time equivalents (FTEs) and any additional internally reallocated FTEs.

V. INTERAGENCY AGREEMENTS

Agencies and institutions shall develop interagency agreements to obtain maintenance, repairs and fuel where feasible.

Agencies and institutions shall provide OVFM with a comprehensive list of interagency agreements for maintenance and fueling no later than January 1, 2001. OVFM will compile and publish a directory on the GSC web site detailing facility locations and available services by May 1, 2001.

VI. STATE FLEET CONSOLIDATION POLICY

Use of state motor pools, whether for individual agencies or consolidated efforts among two or more state agencies, is encouraged to increase vehicle use and improve the efficiency of the state fleet.

Agencies and institutions with existing pools shall require use of pool vehicles over other options, including rental vehicles or employee reimbursement for use of personal vehicles, except in cases where pool vehicles are unavailable, unreliable, or there is a more cost-effective alternative.

Agencies or institutions not currently operating motor pools are required to form motor pools consisting of all vehicles not assigned to field employees. Field employees are those employees whose regular duties require work in locations other than agency headquarters or regional offices and who regularly require a vehicle for ongoing daily duties. Agencies shall review the use of all field vehicles and identify opportunities for reduction/consolidation or establishing motor pools for field employees.

Pool vehicles must be available for checkout as needed. Consistently underused pool vehicles must be rotated to field assignments or sold as surplus.

Assignment of a vehicle to an individual administrative or executive on a regular or daily basis is prohibited without written documentation that the assignment is critical to the mission of the agency or institution.

Agencies or institutions assigning vehicles to individual administrative or executive employees shall report the following information to OVFM no later than February 28, 2001 and thereafter as assignments occur:

- vehicle identification number, license plate number, year, make and model;
- name and position of the individual to whom it is assigned (except law enforcement officers when this reporting could jeopardize the individual's security); and
- reason the assignment is critical to the mission of the agency or institution.

Chapter Three: Sale of Excess State Vehicles

I. DISPOSING OF IDENTIFIED EXCESS VEHICLES

OVFM will identify excess vehicles according to procedures established in the State Fleet Minimum Use Criteria (Chapter Two).

Agencies or institutions may dispose of vehicles through the GSC Surplus Property Division's process (advertising to eligible entities, then sealed bids or auction) or through other approved surplus property disposal processes (for agencies not subject to V.T.C.A., Government Code, Chapter 2175).

Agencies and institutions must certify successful disposal of identified excess vehicles to OVFM within six months from the date of notification. Acceptable documentation includes the *Report on Sale of State Property* for sealed bid sales, or the *Recap of Awarded Bidders* for auction sales.

II. IDENTIFICATION OF VEHICLES FOR DISPOSAL

After OVFM notifies an agency or institution that it must dispose of an excess vehicle, the decision of which vehicle to surplus is left to the agency/institution. OVFM generally recommends that agencies/institutions surplus the oldest vehicles with the highest mileage. Vehicles identified as underused can be rotated to replace excess vehicles, if needed.

The following criteria may help identify a specific vehicle to surplus.

First, consider vehicles meeting the replacement criteria detailed in the State of Texas Vehicle Replacement Goals (Chapter Two). Generally, these are vehicles that are at least 6 years old or have a minimum of 100,000 miles.

Second, consider vehicles defined as underused according to the State Fleet Minimum Use Criteria (Chapter Two). These are vehicles driven fewer than 7,000 miles per year.

Vehicles identified for disposal are not eligible for replacement.

Chapter Four: Lower-Cost Alternatives to Using State-Owned Vehicles

Accurate cost data for comparison with possible lower-cost alternatives to use of state-owned vehicles, such as the use of rental cars or reimbursing employees for use of personal vehicles, does not exist at the time of this Plan's adoption.

The Plan requires agencies to provide data to determine lower-cost alternatives to using state-owned vehicles, including:

- modifying the Uniform State Accounting System (USAS) expenditure codes to track specific vehicle costs;
- modifying OVFM vehicle fleet reporting requirements for state agencies and institutions (see Chapter Five); and
- establishing a pilot project to compare costs of leased vehicles to state-owned vehicles.

OVFM will review available data as of September 1, 2002, and recommend to the CCG no later than February 28, 2003, possible lower-cost alternatives to using state-owned vehicles.

Chapter Five: Data Collection and Agency Reporting Requirements

DATA ELEMENTS

OVFM, with the assistance of fleet managers from the agencies and institutions with the largest vehicle fleets and the State Auditor's Office, developed a list of fleet data reporting requirements (see Appendix A). These data will assist agencies and institutions in making accurate fleet management decisions and meeting requirements of the Texas Administrative Code, Title I, Part 5, Chapter 125(b), Rule 125.45.

All agencies and institutions are required to submit fleet data to OVFM. OVFM's current reporting requirements will remain in effect until March 1, 2001. Agencies and institutions must report:

- fleet data from March 1 through August 31, 2000 to OVFM by September 30, 2000; and
- fleet data from September 1, 2000 through February 28, 2001 to OVFM by March 31, 2001.

Beginning March 1, 2001, state agencies and institutions must capture the data elements listed in Appendix A, Availability Codes A and B. Agencies and institutions shall report this information to the OVFM according the following schedule:

Reporting Period	Due Dates
March 1, 2001 through May 31, 2001	June 30, 2001
June 1, 2001 through June 30, 2001	July 31, 2001
July 1, 2001 through July 31, 2001	August 31, 2001
Reporting periods will continue on a monthly basis.	Due dates will continue to be the last day of every month for the previous month's data.

OVFM will not collect information listed in Appendix A, Availability Code C until a new reporting system is implemented. OVFM will notify agencies when to begin reporting Availability Code C data elements; however, agencies should implement processes to collect Availability Code C data elements as soon as possible.

Agencies and institutions must maintain detailed supporting documentation for all reporting requirements. OVFM will develop a standardized vehicle reporting log for agency use. Agencies and institutions that wish to use forms other than the standardized vehicle reporting log must submit a written request and copies of the proposed vehicle log to OVFM.

The chief operating officer of an agency or institution unable to meet the reporting requirement will explain why it is unable to do so to the CCG and OVFM prior to the reporting deadline.

REPORTING SYSTEM NEEDS

A new uniform electronic reporting system is needed to capture fleet reporting requirements listed under Availability Code B and C. The new system shall be adopted and implemented by OVFM and state agencies and institutions of higher education on a time schedule to be determined by GSC.

Chapter Six: Fleet Management Best Practices

The following guidelines are government and private sector fleet “Best Practices.” These practices increase state vehicle use and efficiency and reduce maintenance and operating costs of the state fleet. All are considered “Best Practices” within a specific fleet program; therefore, not all are applicable to every fleet situation.

State fleet managers should use these practices where feasible. Best Practices adopted by any state agency or institution must be consistent with the requirements of this Plan.

Sources for all Best Practices are documented at the end of this chapter.

I. FLEET SIZE

1. Determine which vehicles are underused using annual mileage as a guide. In most situations, cars or light trucks that are driven less than 7,000 miles per year should be evaluated against the minimum use criteria in this Plan. (Exceptions may occur for vehicles used only on campuses or for special purposes. See “State Fleet Minimum Use Criteria,” Chapter Two, for additional guidelines.) Vehicles should either be reassigned to areas in which they can be used more effectively, such as a central motor pool, or sold. Use sales proceeds to replace vehicles that are older and more expensive to maintain.
2. Cap fleet size at current levels. This forces vehicle operators to do more with the vehicles currently under their control. Replace vehicles only on a one-for-one basis. Allow new vehicles without identified replacements only for legislatively mandated program changes, federal program initiatives, or documented need resulting from program growth or changes.
3. Consider outsourcing general transportation vehicles. Tarleton State University found it more cost-effective to outsource general transportation vehicles through a contracted rental vehicle agency than to own such vehicles. They found they could lease or rent some special purpose vehicles on an as-needed basis. They also allow mileage reimbursement for the use of personal vehicles for employees when this option is more cost effective.

II. FLEET MANAGEMENT

4. Large agencies should assign department or division vehicle coordinators as contact persons for departmental vehicle matters. The agency fleet director or manager should meet with vehicle coordinators to discuss their roles and responsibilities, as well as policies and vehicle issues as they arise.
5. Continuously monitor trade publications for improved processes, products and training materials. Use environmentally friendly products and processes whenever possible.
6. Consider the benefits of having your agency’s fleet manager participate in professional educational opportunities, including the National Association of Fleet Administrators, Inc. NAFA offers workshops and annual meetings, professional certification, publications, information services, and networking opportunities. See the NAFA Web site for more information: www.nafa.org.

III. FLEET POLICIES/PROCEDURES

7. Establish written fleet policies and procedures. Policies and procedures should address, at a minimum:
 - who is eligible to drive an agency vehicle;
 - use of personally owned vehicles;
 - new vehicle delivery;
 - vehicle replacement schedules;
 - disposal of used vehicles;
 - preventive maintenance;
 - warranty tracking;
 - repairs;
 - safety and accident reporting;
 - traffic violations;
 - registration renewals;
 - who is responsible for policy implementation and monitoring; and
 - responsibilities of vehicle drivers.
8. Create a reference card summarizing fleet policies and place a copy of the card in every agency or institution vehicle. Reference page numbers in your agency's complete fleet policies and procedures handbook.
9. Give drivers and operators an easy-to-understand booklet that translates complicated policies and procedures into plain English.
10. Set separate minimum driver qualifications for all employees using vehicles regularly as part of their job and for those who may only occasionally drive a vehicle in work-related activities. Screen potential new drivers through the Department of Public Safety (DPS) for driving violations and license status annually. Set clear penalties for failure to maintain an acceptable driving record.
11. Establish a formal training program to familiarize new drivers with the type of vehicle they will be driving. The program could include defensive driving techniques, as well as information specific to the area (such as a congested campus) where the vehicle will be used.

IV. MOTOR POOL MANAGEMENT

12. Create a centralized motor pool to minimize fleet size. Make it available to all departments on an as-needed basis. Create sub-pools, as needed, for remote locations or departments with special needs.
13. Use state vehicle rental contracts for pool units and for vehicles used infrequently or as back up units.
14. Investigate partnering with other state entities in close proximity to create a joint-use vehicle pool to downsize individual fleets.

V. VEHICLE SELECTION

15. Use "Mules," "Gators," or utility carts instead of licensed vehicles, where appropriate. Several agencies, especially universities, find utility or golf cart-type vehicles useful instead of trucks or

other licensed vehicles when used exclusively on campus. These vehicles are not licensed for on-road use, however, and agencies should follow all traffic laws regarding their use.

Advantages:

- about half the cost of a truck or less (depending upon model);
- can carry two people;
- can be equipped with a bed to carry tools or equipment up to several hundred pounds;
- can get into places where trucks cannot;
- because they are slow moving, they are less likely to be used inappropriately and are safer around student areas;
- ideal for rough terrain because of big tires;
- life expectancy about that of a truck; and
- golf carts can be electric (significant fuel savings).

16. Use life cycle cost benefit analysis software (LifeCycle) when a vehicle is added to your fleet to determine if alternative fuel conversion is cost-effective. If so, you can save significantly on fuel costs. If not, you can apply for a waiver from OVFM and remain in compliance with alternative fuel requirements. Either way, you will save money. Contact OVFM for additional information regarding LifeCycle software.

VI. MAINTENANCE/REPAIRS

17. Rotate tires at manufacturer-recommended intervals and require drivers to inspect tire air pressure weekly. Assist drivers by providing a tire gauge in each vehicle. Properly inflated tires last longer and contribute to fuel efficiency.
18. Replace brake pads and shoes before they wear disks or drums. Pads and shoes are cheaper than disks and drums. Replace as needed and save money in the long run.
19. Establish local agreements for service and repairs with city, county or other state entities. Municipal and state shops usually offer less expensive rates than commercial operations and are often faster than large commercial operations. For example, OVFM operates a “one-stop” maintenance shop in Austin for preventive maintenance, state inspections and minor repairs for state vehicles. The shop can also contract work out for state customers, eliminating the need to bid for major repairs, and then bill the agency directly. If you operate a shop, make arrangements to provide services to other state entities when possible.
20. Recycle parts from wrecked vehicles. DPS routinely reuses driveline components (motors, transmissions and rear ends) from totaled vehicles, where appropriate, resulting in significant cost savings. Body components such as sheet metal and air bags can also be reused. Savings are compounded when such parts are used to refurbish a unit being prepared for disposal. Be sure to remove usable parts from wrecked vehicles as soon as possible and store for future use. Do not keep vehicle carcasses on the premises indefinitely, as they can pose safety and environmental hazards.
21. Create a specific vehicle maintenance policy or schedule for each class of vehicles operated. Enforce the policies and schedules to ensure routine service is completed as scheduled.
22. Consider the benefits of establishing relationships with vehicle manufacturers. If your fleet contains several of the same make or model from the same manufacturer, you should get to know the manufacturer’s representatives in the areas of sales, service and engineering. DPS uses such relationships to expedite service, warranty claims and to obtain information on a

routine basis. If the manufacturer requests your cooperation in testing new fixes for persistent problems or new equipment, try to accommodate them.

23. Track vehicle and parts warranties to achieve maximum savings on maintenance and repairs. A good warranty tracking system can prevent you from paying for repairs or parts that are still covered under manufacturer warranties.

VII. VEHICLE DISPOSAL/REPLACEMENT

24. Dispose of surplus vehicles promptly, in accordance with state surplus property procedures. The longer they sit, the more they depreciate.
25. Prepare vehicles for disposal by using the least amount of resources for the best sales price. If you can use inmate labor or part-time student labor to clean and refurbish vehicles to be sold, you may be able to sell a vehicle for considerably more than it would sell for otherwise. DPS details and repaints most of the vehicles it sells at auction and realizes a higher price with a relatively low investment. DPS also reuses parts from totaled vehicles to refurbish vehicles being prepared for disposal. The Texas Department of Criminal Justice uses inmate labor for vehicle refurbishing, and they are willing to refurbish vehicles for other agencies.
26. Follow the state vehicle replacement guidelines established by this Plan. As an alternative, TxDOT has an internal model called the TxDOT Equipment Replacement Model (TERM) that it uses for 85 percent of its vehicles. TERM is based on three pre-set standards established for each vehicle class code: vehicle age, life usage (mileage or hours of service), and lifetime repair costs. TxDOT is working to make this model available through PC software so that other agencies may use it. Contact TxDOT for more information.

VIII. SHOP MANAGEMENT

27. Use an automated parts inventory system to track parts availability. Such a system can help guarantee that frequently used parts are available when needed and can simplify ordering procedures.
28. Use an automated work order system to automatically schedule preventive maintenance, provide shop productivity and detailed repair information, and update the billing system.
29. Use rebuilt, recycled parts and supplies when possible. Examples include recapped tires and re-refined oil. Rebuilt and recycled parts are usually less expensive than new parts, and, especially for high-mileage vehicles, may be preferable. Sell used batteries, oil, tires and scrap metal to firms specializing in recycling these materials.
30. Train technicians and encourage them to obtain continuing education and certifications. The UT - Austin shop is recognized as a warranty center by General Motors, which means they can do their own warranty work on GM vehicles and be reimbursed directly by the manufacturer. This requires their technicians to be highly trained, and they receive additional training directly from the manufacturer.
31. If your operation includes more than one shop, review the possible cost-savings of consolidating all maintenance areas into one central shop. Possible cost-savings may result from fewer staff, bulk purchases of commonly used parts, decreased need for equipment and tools, and better control of billing procedures.

IX. VEHICLE USE

32. Never overload vehicles. Always stay within the manufacturer's gross vehicle weight guidelines. Overloading vehicles stresses body parts and can be dangerous, as well as harmful to the vehicle.
33. Evaluate vehicle use and rotate underused vehicles within and between departments to achieve maximum use.
34. Transfer high-mileage pool vehicles to on-campus maintenance and grounds departments where they will not be driven as far. This can extend useful vehicle life by several years.

X. FUEL/OIL MANAGEMENT

35. Change oil and fluids at manufacturer-recommended intervals. (See #36 for possible exception.)
36. Couple any attempts to extend oil change intervals with a reliable oil analysis program.

XI. COMMUNICATIONS

37. Improve communications with drivers and fleet coordinators. Institute regular communications such as regular meetings, written memos or newsletters to keep agency drivers and departmental fleet coordinators informed of changes to fleet practices, policies and procedures. Provide information that drivers and those with vehicle responsibilities can use to improve safety, save money or efficiently use present resources.
38. Provide a vehicle use manual with each vehicle. This should be an agency-specific manual that includes:
 - proof of insurance statement;
 - vehicle use rules or policies;
 - accident reporting procedures; and
 - emergency contact telephone numbers.

SOURCES

I. Fleet Size

1. *Automotive Fleet*, September 1999, p. 46-51 and November 1999, p. 64.
2. The University of Texas at Austin (UT – Austin)
3. Tarleton State University

II. Fleet Management

4. *Best Fleet Management Practices and Performance Manual, (BFMP)* Spectrum Consultants, Inc., p. 4 and Office of Vehicle Fleet Management (OVFM)
5. BFMP, OVFM
6. UT - Austin
7. Texas Department of Public Safety (DPS), OVFM

III. Fleet Policies/Procedures

8. BFMP, p. 4, and *Vehicle Operation Policies*, National Association of Fleet Administrators (NAFA) Fleet Information Resource Center
9. *Automotive Fleet*, August 1998, p. 29
10. *Automotive Fleet*, August 1998, p. 29
11. OVFM, UT - Austin
12. UT - Austin

IV. Motor Pool Management

13. BFMP, p. 21, Texas A&M, Texas Department of Criminal Justice (TDCJ)
14. BFMP, p. 20
15. BFMP, p. 21

V. Vehicle Selection

16. *Automotive Fleet*, September 1998, p. 48, UT - Dallas, Texas Tech, Texas A&M - Commerce, Tarleton State University
17. OVFM, Texas A&M - Commerce

VI. Maintenance/Repairs

18. *Automotive Fleet*, October 1998, p. 76
19. *Automotive Fleet*, October 1998, p. 76
20. Texas Rehabilitation Commission, DPS, UT - Austin
21. DPS
22. DPS, UT - Austin, Texas A&M
23. DPS
24. TxDOT

VII. Vehicle Disposal/Replacement

25. BFMP, p. 27
26. BFMP, p. 28, DPS, TDCJ
27. Texas Department of Transportation (TxDOT)

VIII. Shop Management

- 28. UT - Austin
- 29. UT - Austin
- 30. UT - Austin
- 31. UT - Austin
- 32. Texas A&M

IX. Vehicle Utilization

- 33. *Automotive Fleet*, October 1998, p. 76
- 34. BFMP, p. 20
- 35. UT - Dallas

X. Fuel/Oil Management

- 36. *Automotive Fleet*, October 1998, p. 76
- 37. Texas Rehabilitation Commission, Texas A&M

XI. Communications

- 38. *Automotive Fleet*, August 1998, p. 32
- 39. BFMP, p. 7

Chapter Seven: Notification of Rules Requirements

The CCG will notify state agencies and institutions of requirements under House Bill 3125 to adopt rules or policies and procedures consistent with and to implement this Plan. Agencies and institutions are required to adopt these rules or procedures by February 28, 2001.

Chapter Eight: Vehicle Purchasing Restrictions

The vehicle purchasing moratorium imposed by HB 3125 will be lifted for agencies and institutions as soon as agency rules or procedures are adopted to implement the Plan and reviewed and approved by OVFM. Agencies and institutions shall adopt rules or procedures to implement the Plan no later than February 28, 2001 as stated in Chapter Seven.

After February 28, 2001, OVFM will not grant a waiver for vehicle purchases if the agency or institution has failed to adopt rules or procedures as required by V.T.C.A., Government Code Sec. 2171.1045. This provision excludes those vehicles exempted under (b) and (c) of Section 2171.105.

I. FLEET SIZE

Except in cases of legislatively mandated program changes, federal program initiatives, or documented need resulting from program growth or changes, agencies and institutions shall not increase fleet size. The chief operating officer or designee must certify in writing to OVFM any vehicles purchased due to legislatively mandated program changes, federal program initiatives, or need resulting from program growth or changes. All such waiver requests must be received in writing from the Executive Director, President, or head of the agency or institution making the request. Documentation must fully specify the mandate or need to exceed the vehicle cap.

II. REPLACEMENT VEHICLES ALLOWED

Once an agency's or institution's rules, policies or procedures to implement the Plan are approved by OVFM, replacement vehicles may be purchased without a waiver on a one-for-one basis. No approval is needed from OVFM as long as the agency or institution does not increase fleet size; however, agencies must submit written notification of vehicle replacement to OVFM. The notification shall include the following information as soon as it becomes available for both the new vehicle and the vehicle that is being replaced:

- vehicle identification number;
- license plate number;
- year;
- make; and
- model.

III. VEHICLE TRANSFER RESTRICTIONS

Vehicles may be transferred from one agency or institution to another, but only if there is no net increase in the receiving agency's fleet. Exceptions are allowed as indicated above if proper chief operating officer certification is provided.

IV. DONATED VEHICLE GUIDELINES

A state agency or institution may accept donated vehicles; however, donated vehicles are subject to all reporting requirements of the Plan. Agencies and institutions may not replace donated vehicles using appropriated funds without OVFM approval.

V. EXCEPTIONS

Vehicle purchasing restrictions do not apply to the following:

- law enforcement vehicles, including pursuit vehicles;
- emergency vehicles;
- vehicles used for safety purposes;
- vehicles used for vehicle research purposes, such as crash tests;
- heavy equipment, including tractors, bulldozers and highway construction and maintenance equipment;
- vehicles designed to transport 15 passengers or more*;
- non-licensed utility purpose vehicles such as "Mules," "Gators," or golf-carts and fork lifts;
- wrecked vehicles; and
- vehicles destroyed due to a natural disaster.

*if the agency or institution has purchased such vehicles in the past.

APPENDIX A

FLEET MANAGEMENT REPORTING REQUIREMENTS

Item No.	Data Element/Field	Sub-Element/Field	Required By Current Law	Availability ¹	Definition
VEHICLE MASTER RECORD²					
1	Agency Number		Y	A	State agency number as assigned by the Comptroller's office.
2	Facility/District/Region/Section			B	Optional field for agencies with multiple locations (e.g., MHMR hospitals, TxDOT districts, university component number)
3	Vehicle Identification Number (VIN)		Y	A	As listed on the manufacturer's statement of origin (MSO). Need to ensure that the MSO VIN matches the vehicle VIN.
4	Year		Y	A	Year of Vehicle (must be four digits) as listed on the manufacturer's statement of origin (MSO)
5	Make/Manufacturer		Y	A	Chevrolet, Ford, etc. as listed on the manufacturer's statement of origin (MSO)
6	Model		Y	A	Taurus, F150, etc. as listed on the manufacturer's statement of origin (MSO)
7	GVWR		Y	A	Gross Vehicle Weight Rating (GVWR) as listed on the manufacturer's statement of origin (MSO). GVWR is not required for sedans.
8	Wheel Base			B	Measurement for the wheelbase of the vehicle

¹ Availability codes: (A) Information can be collected by current OVFM system, (B) information can be collected by current OVFM system after modifications/interface changes (12 months or less), (C) Current OVFM system is not capable of collecting the information and a new system is required (12-24 months).

² The vehicle master record data fields (items #1-#51) represent data elements that for the most part will be collected once for the life of the vehicle, unless the assignment/use of the vehicle changes. Items #52 and beyond are to be reported on a quarterly or semi-annual basis.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
9	Engine Size	Liters or cubic inches	Y	A	Size of vehicle engine as listed on the manufacturer's statement of origin (MSO) in either liters or cubic inches (displacement)
10	Number of cylinders		Y	A	Number of cylinders as listed on the manufacturer's statement of origin (MSO).
11	Engine oil capacity			C	Number of quarts/liters of oil the engine holds
12	Transmission description			C	manual or automatic
13	Transmission fluid capacity			C	Number of quarts/liters of fluid the transmission holds
14	Drive Type			C	2-wheel drive, 4-wheel drive
15	Tire Size/ Specifications			C	
16	Number of tires			C	4, 6, 8, more than eight. Excluding the spare.
17	Fuel capacity			C	Maximum number of gallons of fuel the vehicle holds. Include auxiliary tanks only if they are used for operation of the vehicle.
18	Factory installed options			C	List all factory installed options from the vehicle Purchase Order (e.g., air conditioning, tilt wheel steering, speed control, power windows/locks/seats, etc.).
19	Warranty			C	The warranty provided with the vehicle both in months and miles. Include the cumulative warranty information if extended warranty is purchased.
20	EPA MPG rating			C	Provide the EPA mileage for city and highway. This information should be available from the manufacturer.
21	Vehicle Emissions Rating			C	As defined on the MSO (e.g., Tier 1, Tier 2, LEV).
22	License Plate Number		Y	A	As listed on the vehicle registration.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
23	SPA Number			B	State Property Accounting (SPA) number. Check with your agency's property manager if you do not have access to SPA.
24	Equipment number			B	Optional equipment number to be used by agencies that maintain unique property numbers in addition to the SPA number.
25	Vehicle Type/Class	<ul style="list-style-type: none"> A. Sedan or station wagon B. Sports utility vehicle C. Mini-van D. Van E. Small Bus F. Bus G. Light duty truck/pick-up H. Medium duty truck I. Heavy duty truck 	Y	B	<ul style="list-style-type: none"> A. Include all sedan and station wagons in this category. B. Include all utility vehicles such as Jeep Wrangler/Cherokee, Suburban, Tahoe, Jimmy, Blazer, Durango, Explorer, Expeditions, Charger, and similar vehicles. C. Include all minivans such as Aerostar, Town & Country, Voyager, Villager, Silhouette, Caravan, Windstar, and similar vehicles. D. Include all other vans (cargo and passenger) E. Include all shuttle bus type vehicles and small school buses up to 15 passengers. Do not include passenger vans. F. Include in this category all vehicles with capacity greater than 15 passengers. G. GVWR up to 8,600 lbs H. GVWR over 8,600 lbs and up to 25,999 lbs I. GVWR 26,000 lbs and over
26	Passenger Capacity			C	Total number of passengers the vehicle is designed to carry including the driver.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
27	Acquisition/Acceptance Date		Y	A	(YYYYMMDD) Date new vehicle was accepted and receiving report was approved for payment. For transferred vehicle, date the vehicle was delivered.
28	Acquisition Cost		Y	A	For new vehicle, original cost of vehicle as itemized on purchase order, excluding components and/or add-ons after acceptance. For transferred vehicle, book value as carried in SPA system.
29	Procurement Funding Source	A. General Revenue Funds B. Reserve Fund C. Lease (all types) D. Local Funds E. Donation F. Federal G. Higher Education Institutional Funds		C	
30	In-Service Date			B	(YYYYMMDD) Date the vehicle is ready for use by agency in day-to-day operations. All necessary components and/or add-ons have been installed.
31	In-Service Odometer			B	Odometer reading for new or transferred vehicle at in-service date.
32	Added Equipment			B	After market additions such as tool boxes, cargo racks, light bars, radios, alternative fuel conversions, etc. Include all items that are added to the vehicle regardless of whether they are capitalized or not.
33	Schedule for Preventive Maintenance			B	GSC Responsibility. Listed in the fleet management system software.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
34	Replacement Schedule	Ex. A. Sedans & Station wagons 6 yrs/100,000 miles B. Light Duty Trucks C. Etc.	Y	B	GSC Responsibility. Assigned by the fleet management system software based on vehicle information entered by the agency. This item will be finalized upon approval of the plan.
35	Capitalized Value		Y	A	Total cost of vehicle (new or transferred) including conversions, components, and/or add-ons permanently affixed to vehicle. Exclude items with individual inventory numbers in SPA. (e.g., a radio that has it own SPA number should not be included in the value of the vehicle)
36	Depreciation Rate			B	GSC responsibility. Standard rate maintained in the OVFM fleet management software/database.
37	Accumulated Depreciation			B	GSC responsibility. Dollar amount for depreciation calculated by the OVFM fleet management software.
38	Current Book Value		Y	B	GSC responsibility. Dollar amount for book value to be calculated by the OVFM fleet management software.
39	Out-of-Service Date			B	(YYYYMMDD) Date vehicle was taken out of service for disposal. Do not use this date to track down time for repairs or any other out of service condition.
40	Disposal date		Y	A	Date vehicle was sold or ownership was transferred.
41	Odometer reading at disposal date		Y	A	Odometer reading at disposal
42	Disposal price		Y	A	Gross Sales Price
43	Net disposal proceeds			B	GSC Responsibility. Calculated by the fleet management system. Disposal price less any disposal incidental costs, etc.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
44	Primary Purpose	A. Agency staff transport B. Client transport C. Materials transport D. Special Purpose Vehicle E. Function Specific Vehicle		C	Select the category that best describes the primary use of the vehicle. "Special Purpose Vehicles" have permanent major equipment/modifications. They are only the ones listed in the Special Purpose Vehicle menu. If your agency has a Special Purpose Vehicle that is not listed, contact OVFM. "Function Specific Vehicles" do not have any special equipment or modifications but can only be used for one specific function. (e.g., a cargo van used in Food Service and any other use is prohibited) For all choices, other than "Special Purpose Vehicle" complete the narrative portion in the Primary Purpose Narrative field.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
45	Special Purpose Vehicle	A. Pursuit Vehicle B. Law-Enforcement Vehicle C. Security Vehicle D. Ambulance E. Herbicide Sprayer F. Inmate Transport G. Fire Suppression H. Aerial Personnel Device I. Air Compressor J. Asphalt Maintenance Equipment K. Core Drill L. Earth Boring Machine M. Crane N. Paint Stripe Machine O. Platform Lift P. Storm & Drain Pipe Cleaning Unit Q. Street Sweeper R. Fuel/Oil Tank S. Water Tank T. Sign Truck		B	<p>A special purpose vehicle is modified or has equipment installed so that it can not easily be used for other functions. To create additional categories, contact OVFM.</p> <p>A. Only includes Department of Public Safety pursuit vehicles .</p> <p>B. Law enforcement vehicles other than pursuit vehicles. Includes vehicles such as those used by the Parks & Wildlife Enforcement, Alcoholic and Beverage Commission agents, Department of Criminal Justice (wardens, assistant wardens, directors)</p> <p>C. Vehicles used for campus/facility security patrol. (e.g., university campus security, TDCJ unit perimeter patrol)</p> <p><i>F. Include all vehicles (vans, buses) equipped with security accessories (steel bars, etc) for transport of inmates/clients.</i></p> <p>G. Includes vehicles permanently equipped with fire fighting apparatus. Vehicles/trucks that must be available for emergency response are "Function Specific".</p> <p>J. Asphalt Maintenance Equipment includes Asphalt Booster, Asphalt Distributor, Asphalt Maintenance Unit, and Asphalt Pothole Patcher.</p>

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
46	Primary Purpose Narrative			C	Description of how vehicle is used. Be specific. For example, a vehicle identified as "staff transport" provide enough information in the narrative to justify the need for the vehicle.
47	Vehicle Location	Zip Code	Y	B	Provide nine-digit number, if available; otherwise, use five digits. Use zip code where vehicle is assigned.
48	Assigned or Pooled Vehicle	I – assigned to individual G – assigned to organization unit P – assigned to motor pool	Y	B	I. Vehicle is assigned to an employee who uses it the majority of the time. Use "I" even if other employees occasionally use the vehicle. If the vehicle is assigned to an individual the name and position of the individual must be provided. G. Vehicle is assigned to a department, division, program, team or other work unit or group and is used by multiple employees within that group. Include the name of the group or unit. P. Vehicle is assigned to a motor pool that is used by multiple employees on an as-needed basis.
49	Individual or group name			B	Give the title of the individual or the division/program name.
50	Position			B	If the vehicle is assigned to an individual provide the individual's agency working title (not the State classification title). (e.g., Fleet Manager NOT Program Administrator II)
51	Commute to home		Y	B	Y or N. Vehicle is used to commute to or from home.

INFORMATION REPORTED MONTHLY TO OVFM					
Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
52	Number of trips per month			C	Number of trips taken in the reporting period (monthly). This information should be obtained from the vehicle mileage log.
53	Number of passengers per month			C	Total number of passengers (do not include the driver) per vehicle in the reporting period. This information should be obtained from the vehicle mileage log.
54	Type of meter	Miles Hours		B	M – Miles H – Hours Must enter “M” or “H” depending on the type of meter used to track monthly use.
55	Odometer/Hour meter reporting period		Y	A	(YYYYMM) Year and month of odometer reading.
56	Odometer/Hour Reading			A	
57	Downtime	# of days	Y	C	Total time vehicle was not in use due to repairs or maintenance. Include time vehicle is awaiting transfer before or after repairs are completed. Any repairs less than four (4) hours (such as an oil change) are not considered downtime. This item will be reported quarterly or semi-annually as determined using the number of days. The OVFM will keep the cumulative downtime for each vehicle.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
58	Preventive Maintenance/ Repairs	A list of Uniform Preventive Maintenance/ Repair/Incidental Codes will be provided by OVFM.	Y	A	Describe preventive maintenance performed. <u>Preventive maintenance is work performed according to recommended maintenance schedule.</u> Other repairs performed at the same time are to be captured under the repair codes. Include maintenance for equipment or components permanently attached to vehicle.
59	Preventive Maintenance/ Repairs Facility	A. In-house B. Commercial or contracted C. Interagency agreement	Y	B	Indicate where the preventive maintenance was performed.
60	Preventive Maintenance/ Repairs Cost	A. Total Cost, if maintenance performed by commercial, contracted or interagency agreement. B. Labor Cost ³ C. Labor Hours D. Parts & Materials	Y	A	Provide total for maintenance performed by commercial, contracted or interagency agreement facilities. Cost of parts and labor must be itemized if preventive maintenance is performed in-house. (Include maintenance for equipment or components permanently attached to vehicle.) Include all lubricants used for preventive maintenance or repairs (if the work is performed in-house) in the cost of Parts & Materials.

³ Direct labor cost is the cost of labor from each specific employee performing a repair or maintenance task. Direct labor is the “composite” or “fully-loaded” labor cost including salary and benefits (total cost to the State) for each employee. Benefits include: vacations, holidays, Worker’s Compensation, sick leave, life, accident, and health insurance, benefit replacement pay, FICA (Social Security & Medicare Taxes), private pension and retirement plans, Unemployment Compensation Payments to Employees. Your HR/payroll office should be able to provide you with salary and benefit information.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
61	Preventive Maintenance/ Repair Time	A. Date repair ordered was opened. B. Date repair order was closed C. Mileage at the time repair was performed.		B	A repair order is opened when a vehicle arrives at maintenance facility for maintenance or repairs (regardless of actual date vehicle is worked on) and closed once work is complete.
62	Accident Repair Expenses		Y	A	Total cost to repair damage due to an accident, whether repairs performed in-house or outside.
63	Incident Repair Expenses		Y	A	Total cost to repair damage unrelated to normal use of the vehicle, such as vandalism, hail damage, flood damage, etc.
64	Standard Labor Rate		Y	B	GSC responsibility. To be calculated by GSC fleet management software.
65	Fuel Facility	A. In-House B. Inter-Agency Agreement C. Commercial		C	Specify type of facility where fuel obtained. An entry must be made each time vehicle is fueled. An entry must also be made for each fuel type if more than one type is used.
66	Fuel Type	A. Gasoline B. Diesel C. CNG D. Propane	Y	A	An entry must be made each time vehicle is fueled. An entry must also be made for each fuel type if more than one type is used. For example, gasoline and CNG.
67	Fuel Quantity		Y	A	Gallons of fuel. A separate entry of gallons must be made for fuel and alternative fuels if a vehicle uses both.
68	Fuel Cost		Y	A	Total cost of the fuel
69	Incidental Lubricants	A. Engine Oil B. Gear oil C. Transmission Fluid D. Brake Fluid E. Hydraulic fluid	Y	A	Incidental lubricants only. Lubricants used during preventive maintenance or repair (such as an oil change or transmission service) must be entered with maintenance or repair.

Item No.	Data Element/Field	Sub-Element/Field	Required by Current Law	Availability	Definition
70	Incidental Lubricants Quantity		Y	A	Quantity of lubricant used in Quarts
71	Incidental Lubricants Cost		Y	A	Total cost of lubricants

FLEET MANAGEMENT REPORTING REQUIREMENTS

Agencies and institutions shall submit the following information to OVFM by October 31 each fiscal year beginning October 31, 2001.

I. INDIRECT EXPENSES/COSTS (OVERHEAD):

Indirect costs cannot be identified with or traced to a given vehicle in an economically feasible way. Consult with budget office personnel, as they may already have a detailed budget that allocates expenses to different agency operations. If applicable, indirect costs will include but are not limited to:

- Indirect Labor. Salaries and benefits associated with fleet management not charged directly to a particular vehicle. These may include the fleet manager, shop foreman/supervisor, security personnel, administrative support costs (payroll, data entry, secretarial, data processing, purchasing, etc.).
- Vehicle Insurance. Insurance premiums for vehicle insurance if your agency or institution purchases a policy.
- Tools/Equipment. Maintenance, repairs and depreciation on diagnostic and other equipment. Cost or replacement for broken/lost small tools.
- Garage Facility. Include rental cost if facility is leased. If facility is owned, your budget office may have a charge rate per square foot. The same is true for the cost of utilities for the facility.
- Fueling Facility
- Car Wash Facility
- Miscellaneous Shop Supplies (such as rugs and cleaning solvents)
- Value of Inventory at Fiscal year end (Inventory on-hand not expensed to a vehicle), including:
 - Parts
 - Tires
 - Oils, Lubricants
 - Fuels