State Vehicle Fleet Management Plan

Developed by the
Office of Vehicle Fleet Management,
Texas Building and Procurement Commission
as directed by the
State Council on Competitive Government

September 2003
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Executive Summary

Statutory Authority
Texas Government Code, Chapter 2171, Subchapter C, §2171.104, requires the Office of Vehicle Fleet Management (OVFM), as directed by the State Council on Competitive Government (Council), to develop a management plan with detailed recommendations for improving the administration and operation of the state’s vehicle fleet. The State Vehicle Fleet Management Plan (Plan) addresses each component specified in, and provides additional direction to implement provisions of, the statute.

Further statutory authority for the Plan and OVFM administration is found in Chapters 2158, 2171 and 2175 of the Texas Government Code. Council authority is codified in Texas Government Code, Chapter 2162.

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

Plan Scope
The State Vehicle Fleet Management Plan applies to all state operated vehicles, both purchased and leased. Vehicles leased by agencies and institutions may have different reporting requirements than state owned vehicles.

Vehicles purchased with state appropriated funds are subject to all requirements of this Plan. Vehicles purchased with federal or local funds are subject to all requirements of this plan except minimum use criteria.

Vehicles used for law enforcement purposes, including pursuit vehicles, are required to adhere to all data collection and agency reporting requirements of the Plan; however, law enforcement and pursuit vehicles are exempt from all other plan requirements.
Administrative Policy

Division of Responsibility

Agency and University Responsibilities
Each state agency and institution shall appoint and maintain an individual specifically responsible for management of its fleet. This position shall be empowered, with executive approval, to make all fleet management decisions within OVFM guidelines, including, but not limited to:

- Vehicle purchase decisions;
- Vehicle replacement decisions;
- Maintenance decisions;
- Repair decisions;
- Vehicle assignment and use decisions;
- Disposal decisions; and
- Review of reported inappropriate uses 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 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 state fleet management plan, with Council approval;
- Set, implement and enforce state fleet policies;
- Provide standardized fleet reports to agencies;
- Within capabilities, develop and offer direct and contracted support for repair and maintenance of state vehicles;
- Offer fleet management support through publications, Web sites, meetings and other forms of communication, as needed; and
- Serve as liaison between the Texas Building and Procurement Commission’s Purchasing Division and state agencies and institutions to ensure that state contracts for fleet functions are maintained and promoted.
Policy and Procedure Requirements

All agencies and institutions operating fleet vehicles are required to maintain written policies and procedures governing operations. Written policies and procedures must be approved by, and on file with, OVFM for agencies and institutions to maintain vehicle purchasing authority.

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.

Vehicle operation policies and procedures shall address, but are not limited to:
- Driver eligibility;
- Use of personally owned vehicles;
- New vehicle delivery;
- Vehicle replacement schedules;
- Disposal of used vehicles;
- Preventative maintenance;
- Vehicle cleaning;
- Warranty tracking;
- Repairs;
- Safety and accident reporting;
- Traffic violations;
- Registration renewals;
- Responsibilities of drivers;
- Vehicle assignment or motor pool procedures;
- Appropriate use of state vehicles; and
- Employee drug testing.
Acquisition Policy

The vehicle purchasing moratorium imposed by HB 3125, 76th Legislature, has been lifted for all agencies and institutions. The moratorium may be reinstated for agencies and institutions failing to maintain OVFM approved fleet policies and procedures. OVFM will not grant purchasing waivers in the event a moratorium is reinstated or an agency operates fleet vehicles without approved written policies and procedures.

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 of an agency or institution 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.

OVFM, with Council approval, may reset agency and institution fleet cap sizes yearly to maintain a cost effective and efficient fleet size. Agencies and institutions will be notified within 30 days of approved changes to their fleet size.

Vehicle Replacement

An agency or institution with approved written polices and procedures may purchase replacement vehicles 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 and institutions must submit notification of vehicle replacement to OVFM through the state fleet data management system.

Vehicle Transfer Restrictions

Vehicles may be transferred from one agency or institution to another, if the receiving agency’s fleet remains at or under its approved cap size. Exceptions are allowed as indicated above if proper chief operating officer certification is provided.

Donated Vehicles

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.

Purchasing Restriction Exemptions

Vehicle purchasing restrictions do not apply to the following:

- Law enforcement 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;
- Non-licensed utility purpose vehicles such as golf carts and fork lifts; and
- Wrecked vehicles.

**Alternatives to State-Owned Vehicles**

OVFM shall periodically conduct reviews of the feasibility of alternatives to state-owned vehicles, including leased and rental vehicles and reimbursement for the use of employee owned vehicles. Review findings shall be presented to the Council.

Vehicles leased by agencies or institutions shall be subject to all data collection and use requirements of the Plan. Exceptions may be granted through waivers approved by OVFM.

OVFM encourages the use of utility vehicles, such as golf carts or gators, in campus or building complex environments. Many maintenance, passenger and small transport activities can be successfully and efficiently accomplished in these environments through the use of small utility vehicles. Agencies should closely adhere to Texas Department of Transportation regulations concerning ‘slow-moving’ and ‘miniature’ vehicles.
Use and Maintenance Policy

Consolidation

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.

Existing Motor Pools

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.

Potential Motor Pools

Agencies and 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.

Motor Pool Use

Pool vehicles must be available for checkout as needed. Consistently underused pool vehicles must be rotated to field assignments or disposed of through statutory means.

Periodic Review

OVFM will periodically review opportunities to consolidate multiple agency motor pools in the same geographic area, including the Capital Complex and the Health and Human Services Complex. OVFM will report the findings of these reviews to the Council.

Vehicle Assignment

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

Reporting Assignment

Agencies or institutions assigning vehicles to individual administrative or executive employees shall report the following information to OVFM 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.

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**Minimum Use**

OVFM will develop and distribute agency-specific quarterly, semi-annual or annual reports, based on reported fleet data, identifying vehicles that have accumulated less than the minimum mileage for the designated reporting period.

The minimum mileage criterion was increased over a three-year period beginning September 1, 2000. As of September 1, 2003 the minimum mileage criteria are:

- 2,750 miles every three months;
- 5,500 miles every six months; and
- 11,000 miles annually.

These criteria can be amended by OVFM with Council approval. OVFM may establish other suitable minimum use criteria with specific agencies or institutions when appropriate.

**Exemptions**

The following vehicles are exempt from minimum use criteria:

- Vehicles with a manufacturer’s Gross Vehicle Weight Rating (GVWR) of more than 8,600 pounds;
- Law enforcement vehicles;
- Vehicles purchased with federal or local funds; and
- Vehicles granted approved waivers by OVFM.

**Waivers**

Agencies and institutions will have 30 days from the 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 agencies may submit for OVFM review includes, but is not limited to:

- How does the vehicle help accomplish the core mission of the agency?
- What services are provided through use of the vehicle?
- What is the core function of the vehicle and how does this relate to the core function of the agency?
- Is the vehicle campus, or complex, bound? If so, 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 may provide waivers for specific time periods for individual vehicles based on 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 Council written documentation stating the agency/institution name, vehicle identification number, license plate, year, make, model and reason for the waiver denial.

**Identification Process**

Agencies and institutions will have six months from the end of the designated reporting period to increase identified vehicle use to approved levels. If at the end of this six-month period the vehicle(s) in question still does not meet the minimum mileage criteria, OVFM will identify the vehicle as excess and notify both the agency/institution and the Council. Vehicles identified as excess will be disposed of as specified in this plan.

**Fueling**

**Fuel Card Contracts**

Statewide contracts for retail fuel dispensing services were established in 1995 with multiple vendors. The state has consolidated these contracts, with the current contract held by the Council. Agencies and institutions are required to use the contracted vendor card for all fuel purchases.

Fuel cards should be issued for specific vehicles, not for individual drivers. This allows for fuel cost monitoring of specific vehicles. Exceptions to the use of state retail fuel services contracts require a waiver approved by OVFM.

**Fueling Practices**

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 generally prohibited for use in state vehicles.

State and institution employees will use self-service islands when refueling at retail fueling stations.

**Alternative Fuels**

Vehicles capable of using alternative fuels will use them exclusively except in certain cases specified in Texas Administrative Code, Title 1, Chapter 125, Section 125.69.

All agencies and institutions must maintain a minimum ratio of alternative fueled vehicles to traditionally fueled vehicles (gasoline and diesel) as defined by Government Code, Chapter 2158, Subchapter A. OVFM may waive these requirements for certain fleet vehicles as described in Government Code and Texas Administrative Code, Title 1, Chapter 125, Subchapter C.
Interagency Agreements

Agencies and institutions are encouraged to develop interagency agreements to obtain maintenance, repairs and fuel where feasible. Agencies and institutions shall provide a copy of the agreement to OVFM no later than 30 days after all parties have signed the agreement.
Replacement and Disposal Policy

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

General Vehicle Goals
In general, passenger vehicles should be replaced when they reach 6 years (72 months) of service or 100,000 miles, whichever comes first. Likewise, cargo vehicles should be replaced when they reach 8 years (96 months) of service or 100,000 miles.

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.

Special Purpose Vehicle Goals
Specialized equipment, such as heavy highway construction equipment, may require the use of customized replacement guidelines. The Texas Department of Transportation’s equipment replacement model (TERM) may be used in lieu of the above guidelines for any or all vehicle replacement decisions.

Disposal of Excess State Vehicles

Identification of Vehicles for Disposal
OVFM will identify excess vehicles according to procedures established in this plan. 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 surplus the oldest vehicles with the highest mileage. Vehicles identified as underused can be rotated to replace excess vehicles if needed.

The following criteria can be used to identify vehicles for disposal:
1. Vehicles past their planned replacement date, as defined by this plan.
2. Vehicles failing to meet the minimum use criteria defined in this plan.

Excess vehicles identified for disposal are not eligible for replacement.

Disposing of Identified State Vehicles
Agencies or institutions shall dispose of vehicles through standard state surplus and salvage property disposal means. Vehicles identified for disposal shall be transferred to the Texas Building and Procurement Commission, State Surplus Property Program for disposal through means defined by Government Code, Chapter 2175. Agencies or institutions not subject to the Government Code, Chapter 2175, may dispose of identified excess vehicles through other approved surplus property disposal processes.
Agencies and institutions, subject to Government Code, Chapter 2175, must certify to OVFM successful transfer of excess vehicles within 30 days of the date of notification. Agencies authorized to dispose of excess vehicles shall certify to OVFM successful disposal of excess vehicles within six months of the date of notification. Acceptable documentation includes the Report on Sale of State Property for sealed bids, or the Recap of Awarded Bidders for auction sales.
Fleet 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. These data will assist agencies and institutions in making accurate fleet management decisions and meeting the requirements of the Texas Administrative Code, Title 1, Part 5, Chapter 125(b), rule 125.45.

All agencies and institutions are required to submit fleet data to OVFM, through the state fleet data management software, on a monthly basis. Agencies and institutions must maintain detailed supporting documentation for all reporting requirements.

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.

Specific data collection requirements are detailed in Appendix A.

Indirect and Overhead Expenses
Agencies and institutions shall submit indirect and overhead expense information to OVFM by October 31 each fiscal year. 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 and overhead 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 agency or institution purchases a policy.
- Tools/Equipment: Maintenance, repairs and depreciation on diagnostic and other equipment. Cost or replacement expense 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
Fleet Management Best Practices

The following guidelines are government and private sector fleet best practices. These practices can 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 and are not, necessarily, 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.

I. Fleet Management

1. 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 use issues as they arise.

2. Continuously monitor trade publications for improved processes, products and training materials. Use environmentally friendly products and processes whenever possible.

3. Consider the benefits of having your agency’s fleet manager or director participate in professional educational opportunities, management conferences and trade shows.

II. Fleet Policies and Procedures

1. Establish minimum policies and procedures. Policies and procedures should address, at a minimum:
   • Driver eligibility;
   • Use of personally owned vehicles;
   • New vehicle delivery;
   • Vehicle replacement schedules;
   • Disposal of vehicles;
   • Preventative 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.

2. 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.

3. Give drivers and operators an easy-to-understand booklet that translates complicated policies and procedures to more understandable language.

4. 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.

5. 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.

**III. Communications**

1. Improve communications with drivers and fleet coordinators. Institute regular communications such as 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.

2. 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.

**IV. Fleet Size**

1. Use annual mileage to determine which vehicles are underused. In most situations, cars or light trucks that are driven less than 11,000 miles per year should be evaluated against the minimum use criterion in this Plan. Exceptions may occur for vehicles used only on campuses or for special purposes. Underused vehicles should either be reassigned to areas in which they can be used more effectively or sold.

2. Cap fleet size at current levels. This encourages 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. It can be more cost effective to outsource general transportation, or special purpose, vehicles through a contracted rental vehicle agency on an as-needed basis than to own such vehicles. Consider allowing mileage reimbursement for the use of personal vehicles when this option is more cost effective.

**V. Fleet Selection**

1. Use utility carts instead of licensed vehicles where appropriate. Utility or golf cart type vehicles can be useful instead of trucks or other licensed vehicles when used exclusively in campus or complex environments. 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 (depending upon model);
- Can carry two to four people;
- Can be equipped with a bed to carry tools or equipment up to several hundred pounds;
- Can get into spaces trucks cannot;
- Less likely to be used inappropriately and are safer in crowded areas due to slower speeds;
- Ideal for rough terrain because of big tires;
- Life expectancy about that of a truck; and
- Golf carts can be electric, providing fuel savings.

2. Consider purchasing vehicles that operate on alternative fuels or have alternative fuel conversions available.

**VI. Vehicle Use**

1. 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.
2. Evaluate vehicle use and rotate underused vehicles within and between departments to achieve maximum use.
3. Transfer high mileage pooled 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.

**VII. Motor Pool Management**

1. 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.
2. Use state vehicle rental contracts for pool units and for vehicles used infrequently or as back up units.
3. Investigate partnering with other state entities in close proximity to create a joint-use vehicle pool to downsize individual fleets.

**VIII. Maintenance and Repairs**

1. 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.
2. 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.
3. Establish local agreements for service and repairs with city, county or other state entities. Municipal and state shops usually offer less expensive rates and are often faster than large commercial operations. If you operate a shop, make arrangements to provide services to other state entities when possible.
4. Recycle parts from wrecked vehicles. Reuse driveline components (motors, transmissions) from totaled vehicles, where appropriate. 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.

5. Create a specific vehicle maintenance policy or schedule for each class of vehicle operated. Enforce the policies and schedules to ensure routine service is completed on time.

6. Consider the benefits of establishing relationships with vehicle manufacturers. If your fleet contains several of the same make or model from one manufacturer, you should get to know the manufacturer’s representatives in the areas of sales, service and engineering. These relationships can expedite service, warranty claims and information requests. If a manufacturer requests your cooperation in testing new fixes for persistent problems or new equipment, try to accommodate them.

7. 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.

8. Change oil and fluid levels at manufacturer-recommended intervals. Couple any attempts to extend oil change intervals with a reliable oil analysis program.

**IX. Shop Management**

1. 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.

2. Use an automated work order system to schedule preventative maintenance, provide shop productivity, detail repair information and update billing systems.

3. Use rebuilt or 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.

4. Train technicians and encourage them to obtain continuing education and certifications. Consider being recognized as a warranty center by an original manufacturer; this will allow you to perform warranty work in your own shop. This requires technicians to be highly trained and to receive additional training directly from the manufacturer.

5. 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.

**X. Vehicle Disposal and Replacement**

1. Dispose of surplus vehicles promptly, in accordance with state surplus property procedures. The longer they sit, the more they depreciate.
2. 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.

3. Follow the state vehicle replacement guidelines established in this Plan. The Texas Department of Transportation’s Equipment Replacement Model (TERM) can also be used to determine the useful life of specialty 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.
Appendix A:

Fleet Management Reporting Requirements
State Vehicle Fleet Management Plan – Appendix A
Fleet Management Reporting Requirements

<table>
<thead>
<tr>
<th>Data No.</th>
<th>Data Name</th>
<th>Entry Rate</th>
<th>Data Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Agency Number</td>
<td>Once</td>
<td>Three-digit state agency number as defined by the Texas Comptroller of Public Accounts</td>
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<td>2</td>
<td>Vehicle Identification Number</td>
<td>Once</td>
<td>Vehicle identification number as defined by the manufacturer.</td>
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<tr>
<td>3</td>
<td>Year</td>
<td>Once</td>
<td>Year in which vehicle was manufactured.</td>
</tr>
<tr>
<td>4</td>
<td>Make / Manufacturer</td>
<td>Once</td>
<td>Vehicle manufacturer</td>
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<tr>
<td>5</td>
<td>Model</td>
<td>Once</td>
<td>Vehicle model</td>
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<td>6</td>
<td>SPA Number</td>
<td>Once</td>
<td>State Property Accounting number.</td>
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<tr>
<td>7</td>
<td>Meter Type</td>
<td>Once</td>
<td>Type of use tracked by the vehicle’s odometer, calculated in either miles or hours.</td>
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<td>8</td>
<td>In-service Odometer Reading</td>
<td>Once</td>
<td>Odometer reading at time vehicle is entered into state service.</td>
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<td>9</td>
<td>Vehicle Class</td>
<td>Once</td>
<td>Vehicle type as defined by SPA class codes.</td>
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<td>Fuel Type</td>
<td>Once</td>
<td>Fuel type used to power the vehicle</td>
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<td>Number of Tires</td>
<td>Once</td>
<td>Number of tires needed to operate vehicle.</td>
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<td>Acquisition Date</td>
<td>Once</td>
<td>Date vehicle was accepted or received</td>
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<td>In-service Date</td>
<td>Once</td>
<td>Date vehicle entered into use for agency operations.</td>
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<td>Acquisition Cost</td>
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<td>Original cost to acquire vehicle.</td>
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<td>Procurement Funding Source</td>
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<td>Source of funds for vehicle purchase.</td>
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<td>License Plate Number</td>
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<td>License plate number as listed on vehicle registration.</td>
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<td>Warranty Expiration</td>
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<td>Vehicle warranty expiration in both date and miles.</td>
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<td>18</td>
<td>Replacement Schedule</td>
<td>Once</td>
<td>Expected date of vehicle replacement based on State Vehicle Fleet Management Plan replacement guidelines.</td>
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<td>Out-of-service Date</td>
<td>Once</td>
<td>Date vehicle was permanently removed from agency service.</td>
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<td>Wheelbase</td>
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<td>Vehicle’s wheelbase measurement as provided by the manufacturer.</td>
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<td>GVWR</td>
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<td>Gross Vehicle Weight Rating as provided by the manufacturer.</td>
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<td>Fuel Capacity</td>
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<td>Maximum number of gallons (or gallon equivalents) or fuel the vehicle is capable of carrying.</td>
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<td>Engine Oil Capacity</td>
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<td>Quarts or liters of oil engine holds.</td>
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<td>Transmission Fluid Capacity</td>
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<td>Transmission</td>
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<td>Designation of manual or automatic transmission.</td>
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<td>26</td>
<td>Drive Type</td>
<td>Once</td>
<td>Designation of 2-wheel or 4-wheel drive.</td>
</tr>
<tr>
<td>27</td>
<td>Tire Size</td>
<td>Once</td>
<td>Tire specifications as provided by the vehicle manufacturer.</td>
</tr>
<tr>
<td>28</td>
<td>Vehicle Emissions Rating</td>
<td>Once</td>
<td>Vehicle emissions rating as provided by the manufacturer.</td>
</tr>
<tr>
<td>29</td>
<td>Passenger Capacity</td>
<td>Once</td>
<td>Total number of individuals the vehicle can carry, including the driver.</td>
</tr>
<tr>
<td>30</td>
<td>Odometer Reading at Disposal</td>
<td>Once</td>
<td>Odometer reading at time of disposal.</td>
</tr>
<tr>
<td>31</td>
<td>Disposal Date</td>
<td>Once</td>
<td>Date vehicle was sold or ownership was transferred.</td>
</tr>
<tr>
<td>32</td>
<td>Disposal Price</td>
<td>Once</td>
<td>Gross vehicle sale price or total value of other disposal methods.</td>
</tr>
<tr>
<td>33</td>
<td>Net Disposal Proceeds</td>
<td>Once</td>
<td>Disposal value less any incidental expenses related to the disposal.</td>
</tr>
<tr>
<td>34</td>
<td>Odometer Reading</td>
<td>Monthly</td>
<td>Most recent odometer reading.</td>
</tr>
<tr>
<td>35</td>
<td>Odometer Reporting Date</td>
<td>Monthly</td>
<td>Date of most recent odometer reading.</td>
</tr>
<tr>
<td>36</td>
<td>Primary Location</td>
<td>Update</td>
<td>Up to three digit location code for the facility, region, district, or section to which the vehicle is assigned.</td>
</tr>
<tr>
<td>37</td>
<td>Purpose</td>
<td>Update</td>
<td>Vehicle’s primary purpose.</td>
</tr>
<tr>
<td>38</td>
<td>Primary Purpose Narrative</td>
<td>Update</td>
<td>Detailed description of the primary purpose of the vehicle</td>
</tr>
<tr>
<td>39</td>
<td>Capitalized Value</td>
<td>Update</td>
<td>Total cost of vehicle (new or transferred) including conversions, components, and/or add-ons affixed to the vehicle.</td>
</tr>
</tbody>
</table>
### Fleet Management Reporting Requirements

<table>
<thead>
<tr>
<th>Data No.</th>
<th>Data Name</th>
<th>Entry Rate</th>
<th>Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>Added Equipment Cost</td>
<td>Update</td>
<td>After market vehicle additions, such as tool boxes, cargo racks, light bars, radios, etc.</td>
</tr>
<tr>
<td>41</td>
<td>PM Schedule</td>
<td>Update</td>
<td>Preventative maintenance schedule</td>
</tr>
<tr>
<td>42</td>
<td>Commute to Home</td>
<td>Update</td>
<td>Designation of vehicle to be used to commute to and from an employee’s home.</td>
</tr>
<tr>
<td>43</td>
<td>Downtime</td>
<td>Occurrence</td>
<td>Total time vehicle was out of use during repair or maintenance work, including transfer time before and after work is conducted.</td>
</tr>
<tr>
<td>44</td>
<td>PM / Repairs</td>
<td>Occurrence</td>
<td>Description of preventative maintenance work and repairs performed.</td>
</tr>
<tr>
<td>45</td>
<td>PM / Repairs Facility</td>
<td>Occurrence</td>
<td>Type of shop where the preventative maintenance or repair work was performed: commercial, in-house or interagency.</td>
</tr>
<tr>
<td>46</td>
<td>PM / Repairs Cost</td>
<td>Occurrence</td>
<td>Total cost of maintenance and repair work conducted.</td>
</tr>
<tr>
<td>47</td>
<td>PM / Repairs Time</td>
<td>Occurrence</td>
<td>Time between receipt of vehicle at maintenance facility and completion of work.</td>
</tr>
<tr>
<td>48</td>
<td>Accident Repair Expense</td>
<td>Occurrence</td>
<td>Total cost to repair damage due to an accident</td>
</tr>
<tr>
<td>49</td>
<td>Incident Repair Expense</td>
<td>Occurrence</td>
<td>Total cost to repair damage unrelated to normal use of vehicle, such as vandalism, hail damage or flood damage.</td>
</tr>
<tr>
<td>50</td>
<td>Fuel Facility</td>
<td>Occurrence</td>
<td>Type of fueling facility used: in-house, commercial or interagency.</td>
</tr>
<tr>
<td>51</td>
<td>Fuel Type Used</td>
<td>Occurrence</td>
<td>Type of fuel purchased</td>
</tr>
<tr>
<td>52</td>
<td>Fuel Quantity</td>
<td>Occurrence</td>
<td>Quantity of fuel purchased, in gallons or gallon equivalents.</td>
</tr>
<tr>
<td>53</td>
<td>Fuel Cost</td>
<td>Occurrence</td>
<td>Total cost of fuel purchased</td>
</tr>
<tr>
<td>54</td>
<td>Incidental Lubricants</td>
<td>Occurrence</td>
<td>Lubricants used during preventative maintenance and repairs, such as engine oil, transmission fluid and brake fluid.</td>
</tr>
<tr>
<td>55</td>
<td>Incidental Lubricant Quantity</td>
<td>Occurrence</td>
<td>Quantity of lubricants used during preventative maintenance and repair work.</td>
</tr>
<tr>
<td>56</td>
<td>Incidental Lubricant Cost</td>
<td>Occurrence</td>
<td>Cost of lubricants used during preventative maintenance and repair work.</td>
</tr>
</tbody>
</table>
## State Vehicle Fleet Management Plan – Appendix A
### Fleet Management Reporting Requirements

<table>
<thead>
<tr>
<th>Data No.</th>
<th>Data Name</th>
<th>Entry Rate</th>
<th>Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Conditionally Required Data Elements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>57</td>
<td>Assignment Detail</td>
<td>Update</td>
<td>Individual or group to which vehicle is assigned.</td>
</tr>
<tr>
<td>58</td>
<td>Assignment</td>
<td>Update</td>
<td>Designates vehicle as assigned to an individual, group or motor pool.</td>
</tr>
<tr>
<td></td>
<td><strong>Optional Data Elements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59</td>
<td>Engine Size</td>
<td>Once</td>
<td>Engine size, in either liters or cubic inches as provided by the manufacturer.</td>
</tr>
<tr>
<td>60</td>
<td>Number of Cylinders</td>
<td>Once</td>
<td>Number of cylinders as provided by the manufacturer.</td>
</tr>
<tr>
<td>61</td>
<td>EPA MPG Rating</td>
<td>Once</td>
<td>Average mileage in both the city and highway as approved by the EPA and provided by the manufacturer.</td>
</tr>
<tr>
<td>62</td>
<td>Depreciation Rate</td>
<td>Once</td>
<td>Rate at which vehicle’s value will be depreciated.</td>
</tr>
<tr>
<td>63</td>
<td>Number of Trips</td>
<td>Monthly</td>
<td>Total number of trips vehicle completes during the month.</td>
</tr>
<tr>
<td>64</td>
<td>Number of Passengers</td>
<td>Monthly</td>
<td>Total number of passengers transported in the vehicle during the month.</td>
</tr>
<tr>
<td>65</td>
<td>Accumulated Depreciation</td>
<td>Update</td>
<td>Dollar amount of the vehicle’s appreciated value to date.</td>
</tr>
<tr>
<td>66</td>
<td>Current Book Value</td>
<td>Update</td>
<td>Book value of vehicle as carried in SPA system.</td>
</tr>
<tr>
<td>67</td>
<td>Standard Labor Rate</td>
<td>Update</td>
<td>Standard labor rate value of maintenance and repair work completed at agency shop.</td>
</tr>
<tr>
<td>68</td>
<td>Factory Installed Options</td>
<td>Once</td>
<td>Optional equipment or vehicle specifications installed by the manufacturer prior to purchase or delivery.</td>
</tr>
</tbody>
</table>

**Entry Rate Key:**

- **Once** Enter values once during life of vehicle.
- **Monthly** Enter values monthly.
- **Update** Update values as changes occur.
- **Occurrence** Enter values as activities occur.
For additional information about fleet management programs in Texas visit the Texas Building and Procurement Commission web site at:
www.tbpc.state.tx.us/fleet

2003 by the Office of Vehicle Fleet Management, Texas

Office of Vehicle Fleet Management
Texas Building and Procurement Commission
State of Texas
PO Box 13047, Austin, Texas 78711

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