

Sam Houston State University
A Member of The Texas State University System

Finance & Operations Policy FO-45
Vehicle Fleet Management

1. Introduction

House Bill 3125, enacted by the 76th Legislature, mandates that the State Office of Vehicle Fleet Management (OVFM), as directed by the State Council on Competitive Government (CCG), develop a management plan for the state fleet. One of the requirements of the adopted state fleet management plan is that state agencies and institutions are to prepare and adopt vehicle fleet management policies and procedures that have been approved by the State Office of Vehicle Fleet Management. This document has been prepared in order to satisfy those requirements and as a guideline for vehicle fleet practices and procedures.

2. Motor Pool

State Vehicle Fleet Management Plan, Chapter Two: Procedures to Increase Vehicle Use, Improve Efficiency of the State Fleet and Reduce the Cost of Maintaining State Vehicles, VI. State Fleet Consolidation Policy, states:

“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.”

In accordance with the above policy all university road vehicles are to be a part of the University Motor Pool. Vehicles purchased out of departmental funds shall remain the custodial responsibility of that department until such time as the department releases the vehicle to the University Property Coordinator for disposal. The vehicles shall be made available for use by authorized university employees for university business. Official university functions and departmental personnel will be given priority in the event of a scheduling conflict. Vehicles assigned exclusively to an individual, group, or location, which is critical to the mission of the University, require a letter of justification and authorization from the University President. The University Police Department, The University President’s car, and special purpose vehicles are excluded from this requirement.

3. Vehicle Fleet Manager

The Vehicle Fleet Manager is the coordinator for vehicle related issues and is responsible for managing the University’s Vehicle Maintenance Facility. Duties include, but are not limited to:

1. Vehicle purchasing decisions [reviews all purchasing decisions and makes recommendations];
2. Vehicle replacement decisions [reviews criteria and makes recommendations];
3. Maintenance decisions;
4. Repair decisions;
5. Vehicle assignment and use decisions [monitors assignments and makes recommendations];
6. Determines rental rates for university pool vehicles [recommends rates to President];
7. Disposal decisions [reviews vehicles for disposal and makes recommendations] and;
8. Review reported inappropriate use of state vehicles.

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The Vehicle Fleet Manager is 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 authorized business with OVFM. It is realized that certain decisions will ultimately rest with upper level management of the university.

This position will also be responsible for observing and enforcing [with the support of upper level management] statewide fleet management policies and procedures at the agency level.

4. Departmental Vehicle Responsibilities

4.1 Vehicle Fleet Liaison

All University departments utilizing road vehicles whether owned, leased, or rented are responsible for designating a person as the Vehicle Fleet Liaison for that department. Each department is to notify the Vehicle Fleet Manager of the name of the individual appointed to be their department Vehicle Fleet Liaison. The Vehicle Fleet Liaison will be responsible for coordination with departmental personnel, other department Vehicle Fleet Liaisons, and the University Vehicle Fleet Manager concerning vehicle related issues such as; data reporting, usage, rental, maintenance, authorized operators, etc.

4.2 Vehicle Expenses

Departments having custodial responsibility for a vehicle are responsible for all cost associated with that vehicle. These costs include, but are not limited to, insurance, routine maintenance, repairs, periodic cleaning, fuel, lubricants, other fluids as needed, and the labor associated with the performance of these functions whether it is performed by University personnel or an independent party.

4.3 Data Management

In Texas Government Code **CHAPTER 2171. TRAVEL AND VEHICLE FLEET SERVICES, SUBCHAPTER C. VEHICLE FLEET SERVICES, § 2171.101**. Vehicle Reporting System, the State Office of Vehicle Fleet Management is required to file an annual report with the legislature and therefore requires all state agencies to report comprehensive information on vehicles; this includes fuel and lubricants data, maintenance and repair data, and trip data. It is the responsibility of each department to provide copies of receipts for all maintenance and repairs to the Vehicle Fleet Manager. It is also the responsibility of each department to provide periodic reports containing the required vehicle data elements as detailed in section

4.3.1. Maintenance and Repair Data, and section 9. Driver Daily Inspection and Trip Log.

The vehicle data reports are to be submitted to the University Vehicle Fleet Manager at least once a month and are due by the 5th working day of the month following the reporting period. Any monthly vehicle data reports submitted after this time require a letter of explanation signed by the department head to accompany them.

4.3.1 Maintenance and Repair Data - University Vehicle Maintenance Facility

Required data elements associated with vehicle maintenance and repairs that are coordinated through the University Vehicle Maintenance Facility will be collected by the vehicle maintenance staff and require no additional reporting from the related department.

4.3.2 Maintenance and Repair Data – Other University Personnel

Departments performing vehicle maintenance or repairs utilizing University staff not associated with the University Vehicle Maintenance Facility need to report the following data elements (see Appendices A-1 and A-2):

1. Vehicle license plate number
2. Vehicle make, model, and year
3. Vehicle odometer reading
4. Date maintenance or repairs performed

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5. Description of work performed
6. Quantity and description of parts or materials used
7. Cost per unit of parts or materials used
8. Name(s) of personnel performing maintenance or repairs
9. Number of labor hours per person required for performance of maintenance or repairs.
10. Labor rate per person per hour for personnel performing maintenance or repairs.

4.3.3 Maintenance and Repair Data – Independent Vehicle Maintenance Facilities

Departments coordinating vehicle maintenance or repairs performed by personnel outside of the University community need to report the following data elements (see Appendices A-1 and A-2):

1. Vendors name, address, phone number, and Federal Tax ID number
2. Vehicle license plate number
3. Vehicle make, model, and year
4. Vehicle odometer reading
5. Date work requested
6. Requested work
7. Quantity and description of parts or materials used
8. Cost per unit of parts or materials used
9. Labor description and cost per unit
10. Towing charges (if applicable)
11. Description and cost per unit of any miscellaneous charges
12. Date performed
13. Date vehicle returned to service

Any questions concerning these data elements need to be presented to the University Vehicle Fleet Manager.

5. Vehicle and Occupant Safety

5.1 Seat Belt Utilization

All occupants of vehicles owned by the University or being utilized for University activities are required to wear seat belts. Each set of seat belts is to be utilized by one person only. If the seat belt set is equipped with a shoulder strap it is to be worn according to design. Seat belts are required to be worn any time the vehicle is moving.

5.2 Vehicle Hazardous Condition

Any vehicle hazardous condition deemed to pose an imminent danger to people or property is suitable grounds for the vehicle to be taken out of service until such condition can be repaired or it has been determined by a professional vehicle technician to be an acceptable condition.

5.3 Vehicle Load (Cargo/Passengers)

The combined weight of all occupants and any cargo being transported is not to exceed the Gross Vehicle Weight Rating (GVWR) for the vehicle. The GVWR for a vehicle is usually located on the driver's doorframe, on the glove box door, or in the vehicle Operators Manual. Any load that will or may exceed a vehicle's posted load rating is to be redistributed so as to fall within that load rating or be transported by an alternative means. All loads are to be positioned as low and evenly as reasonably possible across the load carrying surface and secured to prevent the load from shifting while in transit.

5.4 Vehicle Operator Responsibilities

The vehicle operator is responsible for the safe loading and unloading of all passengers and cargo, that all passengers are securely belted in their seats, and that the cargo is secured to prevent it from shifting while in transit. The vehicle operator is responsible for the safety of all passengers, cargo, the vehicle, and any towed units while in transit. The vehicle operator is responsible for physically inspecting the vehicle prior to operating the vehicle. It is strongly

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recommended that the operator physically inspect the vehicle at 100-mile intervals while in transit to insure the vehicle will continue to operate safely.

5.5 Transporting Passengers in Pickup Beds

Passengers riding in pickup trucks should ride in the cab of the truck unless it would seriously jeopardize the safe operation of the vehicle. Riding in the bed is allowed for short, local trips only if another reasonable alternative does not exist. Passengers riding in the bed are to be seated on the floor, not on the wheel wells or the edge of the bed. Under no circumstances are passengers to ride in the back of a pickup truck standing up. The operator is responsible to insure that the passengers are properly seated and remain so through the duration of the trip.

5.6 Operation of Vans or Vehicles Designed to Transport 15 or More Passengers

This section was created due to concerns involving the safe operation of vans or vehicles designed to transport 15 or more passengers (15+ passenger vans or vehicles) and the National Highway Traffic Safety Administration Consumer Advisory dated April 9, 2001 concerning 15+-passenger van rollover risk. Based upon the Consumer Advisory the following requirements are to be implemented for the safe operations of 15+ passenger vans or vehicles.

5.6.1 Qualified Operators

- 5.6.1.1** All operators of 15+ passenger vans or vehicles are required to undergo an annual vehicle safety-training course that will be administrated by the SHSU Safety Office.
- 5.6.1.2** All 15+ passenger vans or vehicles are to be driven by SHSU faculty or staff personnel experienced or trained in the proper operation of these vehicles.
- 5.6.1.3** All one-day trips utilizing 15+ passenger vans or vehicles carrying 9 or more passengers traveling in excess of 300 miles round trip are required to have two (2) qualified operators.
- 5.6.1.4** All multiple day trips involving 15+ passenger vans/vehicles carrying 9 or more passengers wherein any one days travel is to exceed 300 miles are required to have two (2) qualified operators.
- 5.6.1.5** The above requirements exclude chartered services.

5.6.2 Loading/Transporting

- 5.6.2.1** Any baggage or equipment being transported in or on a 15+ passenger van/vehicle should be loaded to keep the weight evenly distributed as low as possible along a centerline running the length of the vehicle. The baggage or equipment needs to be secured to prevent moving or shifting.
- 5.6.2.2** Passengers need to be seated in a manner that keeps the weight evenly distributed along a centerline running the length of the vehicle.
- 5.6.2.3** It is the responsibility of the vehicle operator to insure that the load is properly located and secured. The load needs to be inspected every 100 miles or less to insure it has not moved or shifted and that the securing equipment has not become loose or come off.

5.6.3 Operation

- 5.6.3.1** If at any time during the course of a trip the vehicle operator notices a change in how the vehicle drives or responds they are required to stop the vehicle and inspect the vehicle and the load for any changes that may have contributed to the change in operation of the

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vehicle. The vehicle operator should also check with the passengers to try to account for the change in the operation of the vehicle.

5.6.3.2 If at any time in the course of a trip the vehicle operator determines a condition exists that poses a potentially serious hazard to passengers or property they are required to stop the vehicle and take whatever reasonable measures are necessary to correct the condition. If the condition cannot be readily and expediently remedied the trip should be stopped until the condition has been remedied.

5.7 Vehicle Security

University vehicles should be parked in a secure area when not in use, if it is not possible or practical, the vehicles should be parked in an open, well-lit, highly visible area. All vehicle keys for University vehicles should be kept secured in a lockable box, drawer, or bag when the vehicle is not in service. Vehicle keys should be signed out and are the responsibility of the signatory party until returned. In the event vehicle keys are lost, the vehicle ignition switch, door locks, and keys will be replaced at the expense of the responsible party.

6. Vehicle Accidents and Incidents

6.1 Vehicle Insurance

The University carries liability insurance coverage in the amount of \$1,000,000 and \$1,000,000 on uninsured and underinsured motorist and \$2,500 personal injury protection on approved drivers who operate University vehicles. Prior to operation the vehicle operator is responsible for checking the Insurance Identification Card to insure that it is present and current.

6.2 Vehicle Accident or Incident Reporting

All vehicle accidents or incidents involving University vehicles or vehicles being utilized for official University business are to be reported to the University Vehicle Fleet Manager within three working days of the occurrence. The report packet shall contain the following:

1. Detailed description of the occurrence and events that contributed to it, include a graphic presentation if possible.
2. Statement from the vehicle operator.
3. Statement from the passengers of the University vehicle.
4. Statements from any witnesses.
5. If applicable, the other involved party's name, address, phone number, name of insurance carrier, and insurance policy number.
6. A copy of the investigating officer's accident report, if a law enforcement officer investigated the occurrence.
7. Estimated cost for repair to all damaged property related to the occurrence.

7. Vehicle Appearance and Identification

The University vehicles provide a very visible representation of the University and therefore should be kept clean and look professional.

7.1 Body Damage

University vehicles that have body damage that alters the structure of the vehicle or is readily apparent and detracts from the overall appearance of the vehicle shall be repaired at the first available date. Body damage that does not alter the structure of the vehicle and is not readily apparent will be repaired at the next scheduled preventive maintenance.

7.2 Identification, Decals, and Logo

No decals are to be placed upon University vehicles except those decals utilized to identify the vehicle as a University vehicle or decals that are part of the original equipment manufacturers visual effects. All vehicles owned by the University, all vehicles on long term lease for the University, all University rolling stock subject to be ridden in or on, and all University rolling stock

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subject to be pulled or towed by a power unit, shall bear the official identification logo on each side of the vehicle. If space does not permit displaying the full logo the words "TEXAS" and "SHSU" shall be displayed on each side in at least 2 inch letters and are to be clearly visible from 100 feet.

8. Vehicle Rental

Departments having custodial responsibility for University vehicles are authorized to charge the requesting department for the use of a vehicle. Such charges shall be in accordance with rates established by the Vehicle Fleet Manager and approved by the President. Departments requiring the use of a rental vehicle shall attempt to do so from other departments in the University community prior to arranging rental from an outside company. Departments arranging for rental vehicles from outside companies are to follow purchasing procedures. Copies of the vehicle rental invoices are to be forwarded to the University Fleet Manager prior to the 5th working day of the month following the month of usage.

9. Authorized Operators

Prior to a University employee being authorized to operate a University vehicle an Employee Driving Permit Request must be submitted and approved by the Business Office Director, the Physical Plant Director, and the Public Safety Director (see Appendix B). Employee Driving Permit Request shall be resubmitted annually.

9.1 License Requirements

Any person who drives a University road vehicle must have a valid State of Texas driver's license as follows:

1. Class "C" license is required for 1) single two-axle vehicles with a gross vehicle weight not exceeding 24,000 pounds [i.e. passenger cars, pick-up trucks, or vans] and 2) buses with a seating capacity of less than 24 passengers. A "P" endorsement is required to operate any passenger vehicle in this classification capable of carrying 16 to 24 passengers including the driver.
2. Class "B-CDL" license is required for 1) single vehicles with a gross weight exceeding 24,000 pounds [i.e. dump trucks or garbage trucks] and 2) buses with a seating capacity of 24 or more passengers. A "P" endorsement is required to operate any passenger vehicle in this classification.
3. The person in whose name the license is issued shall pay the expense of such licenses. University funds cannot be used for the payment of such licenses.
4. All drivers must also be on the University's Approved Drivers List before being authorized to drive a University vehicle.

9.2 Criteria Preventing Operator Authorization

The University will not approve anyone to operate a University vehicle if any one of the following criteria applies to their driving record:

1. The individual has had three (3) or more moving violations within a two-year period during the most recent three years.
2. The individual has had one (1) major violation (such as DWI, DUI, ALR, Reckless Driving, Obstructing Highway or Other Passageway, or Leaving the Scene of an Accident during the most recent three years).
3. The individual has been issued a Points Advisory Notice by the Texas Department of Public Safety within the most recent year.

9.3 Special Requirements for Student Operators

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In accordance with The Texas State University System Rules and Regulations, Chapter VII, Section 2, Subsection 2.3, the following are special requirements for student operation of University vehicles or equipment:

1. Students operating University vehicles must be employed by the University.
2. Student employees will not operate University vehicles between the hours of 12:00 midnight and 5:00 a.m.

9.4 Traffic and Parking Citations

The vehicle operator shall be solely responsible for any traffic or parking citations received while operating a University vehicle.

10. Driver Daily Inspection and Trip Log

Operators of University vehicles are required to perform Pre-trip Inspections each day prior to operating University vehicles. It is strongly recommended that a Post-trip Inspections be performed upon completion of a trip outside of the Huntsville area. Each University vehicle is to have a Driver Daily Inspection and Trip Log that is specific to the vehicle and is with the vehicle whenever it is in operation. See Appendix C for a copy of the Driver Daily Inspection and Trip Log.

10.1 Pre-trip Inspections

Any discrepancies found during the Pre-trip Inspections that constitute a safety issue or pose the potential of damage to the vehicle or its operating systems is sufficient grounds to take the vehicle out of service. Discrepancies that cannot be remedied by immediate action on the part of the vehicle operator shall be reported to the departments Vehicle Fleet Liaison. All Discrepancies should be noted on the Driver Daily Inspection and Trip Log. The department Vehicle Fleet Liaison shall review the completed Driver Daily Inspection and Trip Logs when received and coordinate with the Vehicle Fleet Maintenance Facility for the repair of any discrepancies not previously addressed.

10.2 Trip Log

University vehicle operators are to log a beginning odometer reading for each day when a vehicle is used in the Huntsville area. Additional trip information is to be posted in the vehicle trip log for each trip taken outside of the Huntsville area. The additional trip information shall contain the following elements:

1. Destination of the trip
2. Date(s) of the trip
3. Trip ending odometer reading
4. Purpose of the trip
5. Number of passengers on the trip
6. Name of vehicle operator

10.3 Lubricants

Lubricants purchased for University vehicles are to be shown on the Driver Daily Inspection and Trip Log. When posting lubricants (i.e. motor oil, transmission fluid, brake fluid) indicate date, type of lubricant, quantity, and cost per unit.

10.4 Fuel

Fuel purchased for University vehicles are to be shown on the Driver Daily Inspection and Trip Log. Required data elements vary based upon the location from which fuel is purchased and are as follows:

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10.4.1 Fuel purchased through the fueling station located at the Sam South Complex.

1. Product type
2. Quantity purchased
3. Date purchased

10.4.2 Fuel purchased from other Sam Houston State University fueling stations.

1. Product type
2. Quantity purchased
3. Date purchased
4. Cost per unit

10.4.3 Fuel purchased from locations other than Sam Houston State University fueling stations.

Any fuel purchased from fueling stations not associated with the University should be shown on the Driver Daily Inspection and Trip Log using the same data elements as in section 10.2.2.2. Copies of fuel receipts for these purchases are to be routed to the Vehicle Fleet Manager. The fuel receipts are required to contain the following data elements:

1. Vehicle license plate number
2. Date of purchase
3. Product(s) purchased
4. Cost per unit of product(s) purchased
5. Total cost

11. Vehicle Usage

11.1 Official Use Only

A state road vehicle may be used only for official business of the state and may not be used in connection with any political campaign or non-university-related activity. Only people who are affiliated with the University or involved with University sanctioned activities are authorized to be passengers in University vehicles. A waiver from the University President is required to transport anyone not filling these criteria.

11.2 State Mandated Utilization Criteria

The State Office of Vehicle Fleet Management (OVFM) has established certain minimum utilization criteria that apply to vehicles purchased using appropriated funds and that have a manufacturer's Gross Vehicle Weight Rating (GVWR) less than 8,600 pounds. The minimum utilization criteria are as follows:

1. September 1, 2001 to August 31, 2002 ; 2,250 miles every 3 months (9,000 miles annually)
2. September 1, 2002 to August 31, 2003; and each year there after 2,750 miles every 3 months (11,000 miles annually)

An agency specific quarterly report will be issued from OVFM beginning October 30, 2001 for those vehicles subject to the minimum utilization criteria detailing the vehicles not satisfying the criteria based upon the reported data. The University has 30 days to write letters of justification for the retention of those vehicles. Below is a list of possible methods of justification.

1. A vehicle is so unique or specific in design or function such that it is impossible or impractical for it to be utilized for other purposes.
2. Specific information showing how a vehicle is critical to the University's mission accomplishment.
3. For vehicles that are campus based or primarily used in the local area, how many trips per day or days per month is the vehicle used.

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4. A comparison showing the cost of rental or lease of a vehicle as opposed to the cost of ownership of the vehicle.

If it is deemed by the OVFM that there is insufficient justification for the retention of a vehicle the University will be granted a six-month period to increase the utilization of the vehicle to meet the minimum utilization criteria. Those vehicles still not meeting the minimum utilization criteria at the end of the six-month period will be scheduled for disposal. A different vehicle may be disposed of in place of the underutilized vehicle if the new or increased function of the underutilized vehicle will cause it to meet minimum utilization criteria or have an underutilization justification that has been accepted by the OVFM.

12. Vehicle Replacement Goals

University vehicles will be depreciated using straight-line depreciation over a 6 (six) year period. University vehicles will be evaluated by the Vehicle Fleet Manager on a case-by-case basis but should generally follow the guidelines set forth in Table 12.1 Vehicle Replacement Goals.

Table 12.1 Vehicle Replacement Goals			
Vehicle Type	Age (Years)	Mileage	Cost
Sedans and Station Wagons	6 (six)	90,000	Depreciation + Maintenance/Repair = 1.5 times Purchase Cost
Light Trucks, Passenger/Cargo Vans, and Sport Utility Vehicles (up to 1 ton)	6 (six)	100,000	Depreciation + Maintenance/Repair = 1.5 times Purchase Cost

Approved by the President: November, 2004

Reviewed by: Doug Greening-Director of Physical Plant – 11-01-08
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