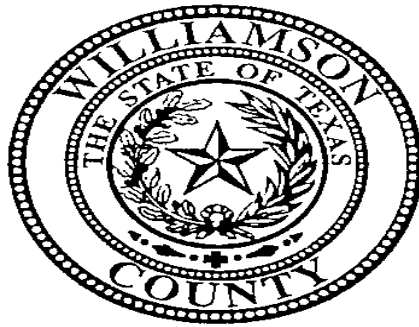




Williamson County Fleet Management Policy Manual



Fleet Management Program Policy Fleet Committee Updated as of March 20, 2019



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FLEET MANAGEMENT PROGRAM

SECTION I

The County's vehicles and equipment are critical components in providing efficient and effective services to the residents of Williamson County. Our goal is to obtain appropriate vehicles/equipment at the lowest cost possible, ensure they are maintained properly and efficiently and ultimately sold for the highest dollar available.

SUMMARY

- A. Define management of county vehicles assigned to drivers that meet criteria outlined in the Vehicle Use Section.
- B. Establish policy and procedures designed to prolong vehicle/equipment life while minimizing costs.
- C. Establish a County Fleet Committee (CFC) in accordance with County Budget Order.
- D. Centralize fleet accountability and control under the direction of the Commissioners Court and guidance of the CFC.
- E. Establish and define functional responsibilities.
- F. Define:



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1. Rolling stock / Heavy Equipment
 2. Unit of Equipment
 3. User department
 4. Under utilization
 5. Types of County Vehicles
- G.** Section II outlines Fleet Services' responsibilities.

POLICY

- H.** This policy is applicable to all County departments regardless of funding source. Note: Exceptions may only be made with Court approval.
- I.** The CFC shall be comprised of representatives from the Fleet Department, Human Resources, Constable Office Pct. 1, Constable Office Pct. 2, Constable Office Pct. 3, Constable Office Pct. 4, Sheriff's Office, Infrastructure, Emergency Services, Purchasing Department, and the Budget Office. The Auditor's Office will be a non-voting member of the Committee.
- J.** All fleet management practices will be conducted between user departments and fleet services in accordance with pre-established operational procedures.

FUNCTIONAL RESPONSIBILITIES

- K.** Fleet Services shall be responsible for centralized vehicle and equipment management to include administration, servicing, operations facilities, acquisition, replacement, utilization, cost, and management information.
- L.** User departments are responsible for ensuring assigned equipment is maintained in a safe and efficient manner at all times; in accordance with County Asset Policy.
- M.** Fleet Services will assist in obtaining quotes or proposals for approved vehicles and handle the disposition of vehicles and associated equipment in accordance with the direction of the Commissioners Court. Purchasing will be responsible for processing Oracle requisitions for purchases and obtaining approval from Commissioners Court for disposal of surplus equipment in accordance with State law and County Asset Policy.

DEFINITIONS

- N.** Rolling Stock / Heavy Equipment – Equipment with engines over 20 HP that are self-propelled, self-powered, or pull-type equipment, including farm equipment or a diesel



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engine with a replacement value exceeding \$5,000 and trailers with a gross load capacity exceeding 1500 pounds. Rolling equipment that does not have a license plate and is intended to be used for agricultural, construction, or industrial tasks (not including motor vehicles).

- O.** Unit of equipment – equipment assigned a Six position alpha numeric Fleet Services control number and listed on the county’s equipment inventory listing, the maintenance of which is principally performed by Fleet Services.
- P.** User department – a County department which utilizes and has responsibility for managing rolling stock assets and certain other equipment for which maintenance and repairs are performed by Fleet Service.
- Q.** Under Utilized – As a general guideline, any vehicle that is driven less than 7,000 miles/year. Exceptions to this guideline include specially equipped vehicles that serve a vital function but are used more for accomplishing an assigned task rather than for transportation needs and vehicles located at remote locations.
- R.** County-Owned Vehicle (used throughout this policy as “vehicle”) shall mean any motor-driven vehicle which: 1) Either has or, in accordance with County Policies, Procedures, and Regulations, should have its title registered in the name of Williamson County and is licensed for use on public roads and 2) Is designed primarily to transport people, rather than to transport cargo or to perform some mechanical function, such as excavation or road grading. Pick-up trucks shall be presumed to be designed primarily to transport people. Such vehicles will be defined in the following categories:

 - 1.** Primary Vehicles –Vehicles that are frontline units approved in Commissioners Court to perform necessary duties by a department. These vehicles are replaceable vehicles.
 - 2.** Back-Up Vehicles – Primary vehicles that have already been replaced but Fleet Services has determined it still has a useful life. The unit will next transition to auction as determined by the replacement schedule.
 - 3.** Auxiliary Vehicles – Vehicles that have been donated, surplus, grant or other unique purchases. These vehicles are not replaceable vehicles.
 - 4.** Turn-In Vehicle – Vehicle that has been replaced or is no longer needed by the department shall be turned in to Fleet Services. At this point the vehicle may be appropriated or disposed of in accordance with county policy under the guidance of the Purchasing Department.



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SECTION II FLEET MANAGEMENT PROCEDURES

BUDGET

- A. Fleet Services shall operate as a cost center utilizing Internal Service Funds which account for the maintenance services provided to other departments or agencies of the government, or to other governments, on a cost reimbursement basis.

EQUIPMENT USE PARAMETERS:

- B. The useful life for each class of equipment will be recommended by the CFC and Fleet Services. The Commissioners Court will have final authority.
- C. Units meeting pre-established replacement criteria will be evaluated by Fleet Services in partnership with the user department to determine if replacement is necessary or if life extension, i.e. rebuild, would be more cost effective.

EQUIPMENT UTILIZATION:

- D. The Budget Office will annually review a listing of vehicles and equipment classified as being underutilized. The Budget Office will make recommendations regarding retention status, i.e. retain in assigned department, reassign to another department, or use for some other organizational purpose. Commissioners Court will have final approval.

EQUIPMENT STANDARDIZATION:

- E. To facilitate standardization of Fleet composition for cost savings and overall maintenance; each fiscal year the CFC will submit recommendations for what will constitute a primary vehicle and/or auxiliary vehicle as applicable. Recommendations should include but are not limited to: standard equipment, specifications, and any reasonable additional costs the county can expect to incur for the purchase and make ready of requested equipment prior to being placed into service. The CFC will review recommendations during the budget process to assess the most reasonable and cost-effective options for the county.

EQUIPMENT REPLACEMENT:

- F. Fleet Services shall provide the Budget Office and user departments with a list of vehicles/equipment in the month of April to review in preparation for annual budget recommendations.



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- G.** Vehicle and heavy equipment replacement funding will be allocated to each department when necessary in accordance with the Fleet Management Replacement Program. Vehicle and heavy equipment replacement recommendations will be reviewed, as applicable, for the following:

 1. Miles or hours
 2. Maintenance
 3. Type of Vehicle / Equipment Requested
 4. Fuel Efficiency
 5. Age of Vehicle
 6. Vehicle / Equipment Utilization

- H.** Departments desiring deviations to the recommended replacement listing or suggested replacement standard shall submit a written request to the CFC office through Fleet Services. The request shall include specific, detailed analysis supporting the requested change. CFC will review the overall list and any non-concurrence issues.

- I.** Requests for replacements not recommended by the Budget Office must be reviewed for justification and approved by the Commissioners Court.

- J.** Vehicle/Equipment replacement will be based on the referenced vehicle/equipment depreciation replacement schedule; as determined by CFC. The finalized recommendations will be submitted to the Commissioners Court for approval.

- K.** Request for adding additional vehicles/equipment to the fleet should be submitted via budget software with adequate justification. . Wherever possible, a loaner/auxiliary vehicle will be utilized to address immediate needs until a more permanent budget solution can be reached. Funds for any differences (i.e. increase) in cost attributable to replacement of a unit with an upgraded unit, as requested by user department – should come from departmental operating budgets.

- L.** Request for rolling stock equipment occurring outside of the budget process, such as a replacement for a total loss accident, must be requested by the Department Head or Elected official and submitted for approval to the Budget Office.

PURCHASING PROCEDURES

- M.** Acquisition of equipment should be obtained by direct purchase. Any other method of acquisition (i.e. lease/purchase) must be reviewed and approved by the Budget Office, Auditor's Office, Purchasing, and Commissioners Court.

- O.** Departments shall complete a requisition in Oracle for each new rolling stock item the department was authorized to purchase.



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- P. Fleet Services, in partnership with the CFC shall be responsible for developing specifications for all new or replacement type equipment.
1. Specifications for cars, pickups, and other light/medium duty trucks shall be in accordance with the standard requirements as established by the State of Texas or another federal agency.
 2. Specifications for large trucks and specialized equipment will be developed by Fleet Management in partnership with the CFC
 3. Specifications will include requirements relating to prototypes, Inspection, training, testing, warranty, etc.
 4. The Purchasing Department will match all recommendations and approved specifications against submitted requisitions and purchase orders.
- Q. Fleet Services in partnership with user departments shall be responsible for reviewing quotes from Purchasing Cooperatives or bids received through formal solicitation.
- **If purchasing from a cooperative:**
Quote for selected vehicle must include a valid cooperative contract number. The quote along with any other necessary documentation for this purchase must be emailed to purchasingbackup@wilco.org. Purchasing will verify the Co-op contract is legal and valid, that items quoted are covered by the Co-op and prepare the item for award by the Commissioners Court. Once approved by Court, Purchasing will issue a Purchase Order to the vendor. Fleet Services and the User Department will be copied on the email.
 - **If purchasing from a formal solicitation:**
Fleet Services will work with user departments and Purchasing to create the bid package. Purchasing will facilitate the entire bid process and the public bid opening. After the bid opening, Purchasing will share responses with both Fleet Services and the department for evaluation purposes. Fleet Services and the department will evaluate all bid responses and will recommend the lowest and best bidder. Purchasing will prepare the agenda item for award by Commissioners Court. Once approved by Court, Purchasing will issue a Purchase Order to the vendor. Fleet Services and the user department will be copied on the email.
- R. All new equipment, along with accompanying documentation, shall be delivered to Fleet Services for acceptance inspection, assignment of Six position alpha numeric Fleet Service Control number, and made ready for service. Equipment shall not be removed by or released to the departments prior to completion of these services.

ANNUAL BUDGET

- S. Operating budgets are to include funds for requested additions and replacements to the fleet.



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- T. Request to replace equipment which occur outside of the budget process, i.e. total loss due to accident will follow standard purchasing procedures as explained in paragraph L above.
- U. Cost attributable to upgrading equipment shall be included in departmental Budgets.

REPLACED EQUIPMENT

- V. Departments receiving new vehicle/equipment replacements shall, upon placing the new unit into service, submit the completed and signed Vehicle Status Change form and return or offline the retiring/transitioning unit to Fleet Services within 30 days. In the event a department is unable to comply with the 30-day policy, the department may request a waiver from the CFC, stating the justification for the delay. The unit being turned in shall be cleaned, detailed and made ready for immediate sale.

SECTION III POLICIES & PROCEDURES

- A. User Department shall be defined by Department Number and Name
Example #405 Veteran Services
- B. Each Department shall designate an employee as a Fleet point of contact:
 - 1. Contact name, phone number and e-mail shall be sent to the Fleet Services Director.
 - 2. Contact person shall receive and respond to all fleet issues concerning their department.
- C. Preventive Maintenance Program
 - 1. Preventive Maintenance shall be performed as required by the Manufacturer.
 - 2. Weekly notices of units requiring service shall be sent to the contact person.
- D. Fueling of vehicles and equipment
 - 1. It is strongly encouraged for County vehicles to be fueled from County-Owned pumps and Fuelman stations when available.
 - 2. The fuel fobs and/or fuel cards shall be issued to the vehicle. The employee shall enter their PIN # and the correct mileage. This mileage entry is the basis of the utilization and replacement reports as well as the Preventive Maintenance Schedule.
 - 3. The department fleet point of contact shall supply Fleet Services with the new employee information so the PIN# can be put into the system.



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4. When an employee separates from County employment, the fleet point of contact for the corresponding department shall inform Fleet Services so that the employee and PIN# can be removed.

- E.** Accident reports on vehicles and equipment:
Damage to a vehicle or piece of equipment that is not part of the normal wear and tear shall be reported by the corresponding department, via the electronic incident report located on Wilco 365, within 48 hours.

- F.** Monthly billing reports to each user Department
Each user department receiving services and or fuel from Fleet Services will be billed for those cost on the first week of each month.

- G.** Procedures for maintenance and repair of vehicles and equipment Appointments
 1. Please feel free to call in advance to schedule an appointment at 943-3349
 2. Drive ins will be serviced in a first come first serve basis.
 3. Before you come in: Please be aware that we do not have loaner or rental vehicles.
 4. Vehicle Drop Off: Write down the odometer or hour meter reading and the unit number.
 5. Bring keys and information to the shop office and someone there will assist you.
 6. Please do not make the request to the Repair Technicians.
 7. Give reason for appointment and explain any problems you have noticed with the unit.
 8. Leave your name and phone number where you can be reached.
 9. The parts room is a restricted area. Unauthorized personnel are not allowed in the parts room.

- H.** After Hours Drop Off
 1. For after-hours drop off, complete a repair form.
 2. Leave unit parked on the north side of the body shop.
 3. Place keys in designated location, leave form or note on dashboard

- I.** The Fleet Services Department Office
 1. Will tell you approximate time your vehicle should be ready.
 2. You may call 943-3349 to check on the status of your unit.
 3. Shop hours are 7:30 a.m. to 4:00 p.m.

- J.** Vehicle Pick Up
 1. Your vehicle will be parked in the south side parking lot behind the fence.
 2. Key will be in designated location.

- K.** Retirement of vehicles and equipment
A Vehicle Status Change Form (VSC) must be filled out on any unit that will be leaving the users department.

The VSC form must be approved by the Department Authorized Signer. After submission, the VSC form will be reviewed by Fleet Services, Human Resources, Budget Office and



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Auditor's Office as necessary. Once those approvals have been obtained, the VSC form will advance to Purchasing for placement on the next Commissioners Court agenda. After Court approval for disposition, the owning department has (30) days to turn in the vehicle and all keys to Fleet Services or request a waiver as per Item V in Section II of this document. Salvage parts will not be removed from any vehicle/equipment once it is posted for auction unless authorized by Commissioners Court. At the Fleet Manager's discretion parts may be used from auction make-ready vehicles/equipment as long as it does not significantly affect the sale of the vehicle/equipment. When the vehicles/equipment has been traded or sold these units will be again listed with their recovered dollar amounts on the court agenda for the Record.

SECTION IV

Vehicle and Equipment Idling Policy

No employee shall cause or allow a motor vehicle engine or other engine within his or her custody or control to idle for more than five consecutive minutes when the motor vehicle is not in motion or when the other engine is not being used for its primary function.

No employee shall switch the motor vehicle or other engine off and back on in a manner that would serve to satisfy the five-minute limitation, but defeat the intent of this policy, which is to reduce emissions, fuel consumption, and vehicle motor and other engine wear caused by engine idling.

Additional Suggested Ways to Reduce NOX Emissions

- Keep your vehicle well-tuned and tires inflated properly
- Fuel vehicles early morning/late in day when temperatures are cooler
- Fuel when half tank empty to minimize evaporation

DEFINITIONS

Idle – The operation of an engine in the operating mode where the engine is not engaged in gear, where the engine operates at a speed at the revolutions per minute specified by the engine or vehicle manufacturer for when the accelerator is fully released, and there is no load on the engine.

Motor vehicle – Any self-propelled device powered by an internal combustion engine and designed to operate with four or more wheels in contact with the ground, in or by which a person or property is or may be transported.

Other engine – A gasoline, diesel, propane, CNG, or other petroleum-fuel based vehicle with an internal combustion engine, that is not a motor vehicle as defined above, but which is mobile and is



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utilized in construction, earth-moving, materials management, transportation or grounds-keeping type operations.

Exceptions:

1. The motor vehicle is prohibited from movement due to traffic conditions over which the operator has no control.
2. The motor vehicle or other engine is being used in an emergency or law enforcement capacity.
3. The engine is being operated solely to defrost a windshield.
4. The motor vehicle or other engine being used as a primary power source for another device such as a power take-off (PTO) unit.
5. The motor vehicle or other engine is being operated for maintenance or diagnostic purposes.
6. The motor vehicle is idling to operate the air conditioning or heating system for employee health or safety.