

**TITLE II
ADMINISTRATIVE REGULATIONS**

CHAPTER 29 FLEET POLICY AND PROCEDURES

29.01 Purpose

The purpose of the Fleet Policy is to provide guidelines for the use of the Town of Flower Mound's fleet equipment and services provided by the Fleet Services Division.

29.02 Definitions

"Fleet Equipment" shall reference any numbered vehicle and/or equipment owned by the Town of Flower Mound, maintenance of which is principally performed by the Fleet Services Division.

"Department and/or Division" shall reference a unit of organization of the Town of Flower Mound, directly responsible for the ownership, use, and service funding required to maintain the equipment.

"Fleet Coordinator" shall reference the representative of a department who acts as a liaison between that department and/or division and Fleet Services.

29.03 Directive

The use and maintenance of fleet equipment at all levels will be in accordance with this policy. Provisions of this policy shall not be taken to supersede or nullify current policies and procedures set forth elsewhere. Such conflicts shall be brought to the attention of the Fleet Services and Materials Manager, who shall resolve the question.

29.04 Ownership and Accountability

While all town-owned equipment is, and should be, generally regarded as property of the Town of Flower Mound, the care, custody, and control of assigned fleet equipment is hereby expressly extended to the director of the primary using department, insofar as this care, custody, and control, is exercised with prudence under the general direction of the Town Manager. Therefore, directors shall be accountable for the utilization, preservation, and general condition of the fleet equipment entrusted to their custody. Fleet equipment ownership shall be temporarily transferred to the custody of the Fleet Service Manager and/or Fleet Services representative when delivered to the Fleet Service facility for service, at which time, the aforementioned accountability shall pass to the Fleet Services Division until the Fleet Services Division releases said equipment for use. The

Fleet Services Division reserves the right to refuse use of said equipment until it is determined by Fleet Services to be in safe operational condition.

29.05 Responsibilities

- A. Fleet Services Responsibilities
 1. Make recommendations for the most cost-effective management of the municipal fleet.
 2. Ensure that the municipal fleet is maintained at an acceptable level of operational readiness.
 3. Perform and/or coordinate maintenance and/or service on all fleet equipment.
 4. Review and make recommendations on all fleet equipment bid specifications.
 5. Maintain historical record, technical references and a master inventory of fleet equipment.
 6. Project and recommend replacement of fleet equipment.
 7. Advise the Executive Director of Financial Services of problems and/or opportunities concerning fleet equipment.

- B. Department Responsibilities
 1. Assign Department and/or Division Fleet Coordinator(s) who shall act as liaison(s) to Fleet Services on all fleet matters.
 2. Ensure that equipment is delivered to the Fleet Service facility when notified.
 3. Ensure that equipment is utilized efficiently and properly.
 4. Ensure that equipment is maintained in accordance with provisions of this policy.
 5. Ensure that all documentation pertaining to repairs and/or services performed by any outside vendor be forwarded to Fleet Service for proper tracking.

29.06 Equipment Services

Repairs and services, both in-house and sublet, on all municipal equipment will be processed through the Fleet Services Division. Fleet Services will place all municipal equipment into a service cycle defined as follows; however, in either case, a Fleet Services Work Order Request should be completed when equipment is brought to the Fleet Service facility for any services.

- A. Scheduled Services - equipment will be scheduled for PM inspections and services based on meter (mileage or hours) of operation. Departments and/or Divisions will be notified by Fleet Services of required scheduled services and will be advised of times when express service will be provided. Fleet Services will inspect equipment brought in for service in accordance with the manufacturer's recommendations and any special requests. Minor repairs will

be made during the service or deferred until the equipment can be re-scheduled for repair, providing that the deferral will not cause further mechanical complications or a safety hazard.

B. Unscheduled Service - Unscheduled service is subdivided into the following categories:

1. Equipment in disrepair but operational - equipment which is in need of repair but still operational will be delivered to the Fleet Services facility by the operator. The Fleet Services technician, or designee, will inspect the equipment, paying particular attention to the area of the reported failure. An estimated completion date for repairs will be set if the problem cannot be immediately rectified. In instances in which required parts are not on-hand and which continued operation of the equipment will cause damage or hazard, the Fleet Services and Materials Manager may defer the repairs until the parts are on-hand and contact the appropriate department and/or division at such time. Should the equipment be deemed operable but unsafe for use, or likely to sustain further damage if used, the Fleet Services representative will deadline (not available for use) the unit until repairs can be made. Should extraordinary delays occur in the repair of equipment due to workload or priority, the Fleet Service representative should contact the Department and/or Division Fleet Coordinator for assistance.
2. Equipment in disrepair and not operational - in instances where equipment is not operational (broken down), the operator should notify Fleet Services and relay the following information:
 - a. Operator name
 - b. Location of equipment
 - c. Equipment number
 - d. Symptoms or repairs required
 - e. Telephone number to contact
 - f. Equipment meter (mileage or hours)

Fleet Services will dispatch an individual to accomplish repairs or, based on the repairs required or symptoms communicated by the operator, a wrecker for towing the equipment to the Fleet Service facility. Departments and/or Divisions are required to perform whatever operator level maintenance within their capability (such as jumping off equipment with battery cables) prior to contacting Fleet Services for assistance.

29.07 Priority of Equipment in the Service Cycle

Municipal equipment in the service cycle will be prioritized in the following manner:

- #1 Public Safety - (Police & Fire Services)
- #2 Essential Services (Public Works and field vehicles)
- #3 Preventive Maintenance (delivered on schedule)

#4 All other corrective services

#5 Preventative Maintenance (not delivered on schedule)

The priorities listed above are to be used as a routine guide and may be suspended by the Fleet Services and Materials Manager if unusual circumstances so require. Departmental and/or Divisional Fleet Coordinators should contact the Fleet Services and Materials Manager to request a suspension of routine priorities. Priorities apply only to those units that are directly involved in the stated category (i.e., a police patrol car would be a priority 1, while a police vehicle used for administrative purposes would be a priority 4).

29.08 Equipment Pick Up Procedure

Pick up of equipment from Fleet Services will be the responsibility of the user. Fleet Services will establish an estimated completion time and will contact users by automated email when repairs are complete. When an operator arrives to pick up equipment, he/she should sign the service order for acceptance of the equipment. Fleet Services will be responsible for the security of the equipment until pick up by the user Department and/or Division.

29.09 Towing

Fleet Services maintains a customer/vendor relationship with a local wrecker service. The Fleet Services representative will determine when the wrecker will be dispatched based on repairs or symptoms related by the operator. Operators will follow the procedures defined in Section 29.06B or Section 29.10 when towing requirements are suspected. In regard to emergency equipment (i.e. police and fire vehicles), due to the sensitivity of equipment and time restraints, towing of these units will primarily be coordinated through the respective department and/or division and a copy of all related documentation delivered to Fleet Services on the next available work day for posting into the Fleet Services Management System and processing of the invoice.

29.10 After Hours Emergency

In the event equipment becomes disabled during weekends, holidays, or other such times when Fleet Services personnel are not on duty, the operator shall follow Departmental and/or Divisional procedures regarding towing and storage. In the event there is a need for afterhours emergency repairs, it is the responsibility of the acting Department and/or Division to coordinate the emergency repairs or services and deliver a copy of all related documentation to the Fleet Services Division on the next available work day for posting into the Fleet Services Management System and processing of the invoice.

29.11 Operator Level Maintenance

It is the responsibility of equipment operators to perform routine pre- and post-operator service on assigned equipment. Departments and/or Divisions shall establish and enforce internal policies to ensure that the following checks are accomplished.

Pre-Operation Service

1. Perform a visual walk-around inspection of the equipment for fluid leaks or obvious damage.
2. Inspect the following fluid levels where appropriate:
 - a. Engine oil
 - b. Battery fluid levels
 - c. Cooling system level
 - d. Hydraulic oil
 - e. Transmission fluid (after warm up)
3. Inspect the engine compartment for loose or frayed belts, hoses, etc.
4. Check tire pressure to insure compliance with the manufacturer's specifications.
5. Maintain proper lube levels at all manufacturer recommended lube points for the equipment.

Post-Operation Maintenance

1. Equipment should be topped off with fuel.
2. Fluid and lube levels, as previously defined, should be inspected and corrected where applicable.
3. Windows should be rolled up, equipment locked, and keys turned in to supervising personnel.

In any instance where the operator notes a discrepancy with the equipment, it should be reported to his/her immediate supervisor who should then coordinate with Fleet Services to correct the problem.

29.12 Equipment Cleaning

Each Department and/or Division is responsible for maintaining the cleanliness of assigned equipment. Equipment interiors, exteriors, and under carriages should be cleaned at regularly scheduled intervals to be determined by the Department and/or Division. Fleet Services may defer service on equipment until body and/or undercarriage is cleaned of extraordinary accumulation of grease, dirt, or mud. Fleet Services will accomplish cleaning of engines in conjunction with scheduled services. In developing schedules and standards for equipment cleaning, variable standards of cleanliness for different classes of equipment should be considered.

29.13 Equipment Modification

Modification to fleet equipment will not be performed without authorization from Fleet Services. Requests for modifications must detail proposed dimensions, materials, and approximate costs.

29.14 Equipment Abuse and/or Neglect

Fleet Services will notify the appropriate Fleet Coordinator in any case where equipment abuse, misuse, or neglect is suspected. Upon notification by the Fleet Services Coordinator, the appropriate Department and/or Division Manager will investigate the report, determine if equipment abuse has or is occurring, and take appropriate action. In the instance where there is a second occurrence of a similar case, or a series of abuse incidents in a particular Department and/or Division, the Fleet Services Manager will notify the appropriate Department Head.

29.15 Cost Accountability - Services and Repairs

The Fleet Services representative has discretion for services/repairs under \$300 in parts for sedans and pickups and services/repairs under \$500 in parts for all large class rolling stock. If, in the opinion of Fleet Services and Materials Manager, services/repairs are necessary that exceed the minimum parts cost, he/she must confer with the Fleet Coordinator. In the event the Fleet Coordinator declines repair, the owning Department and/or Division will either transfer the equipment for auction or remove the equipment from the Fleet Services facility and/or restore the equipment to service, subject to the provision of Section 29.06B.

These discretionary amounts may be eliminated by the Department and/or Division if their fleet maintenance line item falls below 10% of the original budgeted amount.

29.16 Equipment Accidents

The procedure to follow for accidents involving fleet equipment is as set forth in the PARM. If the equipment is not operational, the procedures described in Section 29.06B or 29.10 should be followed, depending on the time of day. Fleet Services will coordinate and/or perform damage repairs.

29.17 Procedure for Placing Equipment into Surplus

A. Prior to the turn-in of surplus equipment, the owning Department and/or Division is responsible for thoroughly cleaning the equipment and coordinating with Fleet Services the removal of markings or any ancillary items.

- B. The unit will then be turned into Fleet Services along with the assigned gas card, keys, and pertinent documents. Fleet Services will secure the gas card and notify Accounting and Budget Services of acceptance of the unit into the surplus storage pool

29.18 Transfer of Equipment

From Surplus (One for One) - In the case where a Department and/or Division identifies equipment in the surplus pool which is better suited for operation than an assigned unit, the following procedures will be followed to request a trade:

- A. The Fleet Coordinator will submit a written request with Department Head signature approval, through Fleet Services, requesting a trade identifying the units involved and the justification for the transfer.
- B. Fleet Services will review the request and make a recommendation. Said recommendation shall include consideration of maintenance versus replacement costs, as well as, impact on manpower needs in Fleet Services. If a decision is made to approve the trade, a recommendation memo stating the decision will be sent from the Fleet and Material Services Manager to the requesting Department and/or Division, and a copy sent to Accounting & Budget Services should VERN contributions for the transferred vehicle/equipment require adjustment.
- C. Fleet services will document the actual trade and coordinate with same on the gas card, property, and control numbers.
- D. Upon compliance with Section 29.17 on turn in of the trade-in equipment, Fleet Services will issue the unit to the Department and/or Division and enter it into the Equipment Maintenance Cycle. The Department and/or Division is then responsible for delivery and pickup of the unit to the appropriate vendor for installation of the radio telecommunications equipment (if applicable). The unit will be returned to Fleet Services for installation of emergency lights, headache racks, toolboxes, etc. In regard to the Police and Fire equipment, the respective department is responsible for delivery and pickup of the unit to the appropriate vendor for installation of the radio telecommunication equipment, emergency vehicle lights, sirens, video equipment, telephones and equipment markings. A copy of all related documentation must be forwarded to Fleet Services for posting in the Fleet Services Management System and processing of the invoice.

Transfer of Equipment from Surplus Without a Replacement - In the case where a Department and/or Division identifies equipment in the surplus pool which is required to fulfill an additional need, the following procedure is to be followed:

- A. The Department and/or Division will submit a written request to Fleet Services identifying the unit desired and justifying the need for the addition.
- B. Fleet Services will review the request, evaluate the unit requested, and determine the condition of the requested unit. Fleet Services will then make a written recommendation to either retain or refuse unit retention based on unit condition and requesting Department and/or Division's intended use. Said decision shall include consideration of maintenance versus replacement costs, as well as, impact on manpower needs in Fleet Services
- C. The requesting Department/Division shall then follow the Town's procedures for retaining equipment set forth in the PARM, Title II, Chapter 22.
- D. If approved, procedures for retaining a unit from surplus, as set forth previously in this section, shall apply. The recipient of the equipment will be responsible for paying all maintenance costs (including labor) for the equipment until removed from the fleet.

Note: This process is temporary and does not justify a permanent addition to the fleet. This unit is not eligible for replacement. Therefore, when this equipment is removed from the Town's fleet, a request for a new unit/fleet addition (not replacement) must be approved through the normal budget process if the department has identified a permanent or ongoing need to add a vehicle/unit as a permanent fleet addition.

Inter-Division Transfers - Transfer of equipment between Divisions will be carried out as specified above regarding a transfer from surplus.

Request for Replacement while the Retaining Equipment is being Replaced – In order to retain equipment that is being replaced, follow the procedure outlined above regarding the transfer of equipment from surplus without a replacement.

29.19 Receipt of New Equipment

All new equipment to be accepted into the Town's fleet will be received at the Fleet Service Facility. The following procedure will be followed for acceptance of all new Fleet Equipment:

- A. Fleet Services will arrange with the equipment manufacturer or distributor a mutually agreeable time for delivery of equipment.
- B. When the equipment is delivered, Fleet Services personnel and optionally the user department will inspect the equipment to ensure compliance with bid specifications.

- C. In the event the equipment is rejected for non-compliance with bid specifications, the manufacturer or distributor will be given a reasonable period of time (determined by a mutual agreement) to correct the areas of non-compliance.
- D. Upon acceptance of the equipment, Fleet Services will retain the certificate of origin and apply for title and tags. When received, a copy of the title will be retained in the unit's master file, and originals sent to the Town Secretary's Office. Fleet Services will assign a property and vehicle control number, order a fuel card for the unit, register the equipment with the Town's insurance carrier, process the invoice for payment, and notify Accounting and Budget Services with a completed Fixed Asset Form.
- E. Fleet Services will prepare the equipment for issue by installing required accessory equipment, identification markings, and any modifications requested by the receiving Department and/or Division. The equipment will then be entered into the Equipment Maintenance Cycle and issued to the Department and/or Division. In the case of replacement equipment, Fleet Services will not issue the replacement unit until the equipment to be replaced has been turned in, as specified in Section 29.17. The Department and/or Division is responsible for delivering the unit to the appropriate vendor for installation of radio equipment, and other specialized equipment such as emergency lighting, sirens, video equipment and telephones. All other additions shall be done through the Fleet Services Division. In regard to the Police and Fire units, the respective department is responsible for delivery and pickup of the unit to the appropriate vendor for installation of the radio telecommunication equipment, emergency vehicle lights, sirens, video equipment, telephones and equipment markings. A copy of all related documentation must be forwarded to Fleet Services for posting in the Fleet Services Management System and processing of the invoice.

29.20 Licenses and Safety Inspection

Invoices and statements of origin are to be supplied by the manufacturer or distributor of the equipment. Fleet Services will conduct equipment safety inspections in accordance with the Texas Department of Public Safety criteria. The inspections will be conducted during the scheduled service of the unit, whenever possible. In the event that a vehicle's inspection sticker has, or is close to expiring, the owning Department and/or Division is responsible for contacting Fleet Services to perform the inspection.

29.21 Acquisition of New Equipment

For More Detail on This Section See Parm Title II Chapter 22 Vehicle/Equipment Replacement Policy

Acquisition of new equipment will normally be accomplished during the fiscal budgetary process. The procedure for acquiring new replacement or additional equipment will be as follows:

- A. All fleet equipment that exceeds standard life expectancy, in either age or usage, shall be evaluated for replacement by Fleet Services as a part of the annual budget process. One element in the evaluation process shall be an economic evaluation of the equipment. The economic evaluation will be based upon a model that utilizes the actual Operations and Maintenance (O&M) history, the estimated salvage value of the equipment at that time, and the opportunity cost of capital for that equipment. This evaluation shall accompany replacement proposals for all fleet replacement requests. Any Fleet Equipment proposed for replacement, but not yet at/or beyond its life expectancy, shall also be evaluated for replacement by Fleet Services.
- B. For budget proposals for outright additions of Fleet Equipment, the Department and/or Division making the request should include an average maintenance cost for that type of equipment on this request
- C. If approved in the final budget, the Department and/or Division may then prepare a Fleet Services Vehicle-Equipment Purchase Requisition form. The Fleet Services and Materials Manager shall then discuss the spec needs with the user department and then write the specifications for the equipment (refer to Section 29.22). Fleet Services will provide the final specifications to the user department. The user department will be responsible for complying with the Town's Purchasing Policy.
- D. Fleet Services will review the bids and make the bid award recommendation accordingly. The method of procurement may require additional personnel to participate in the bid review process.

29.22 Equipment Specification Writing

Should the user department have a unique need for a vehicle or equipment that is not currently available in the TOFM fleet, The Fleet division is available to assist with spec generation.

Process for writing equipment specifications:

- A. Identify need within Department and/or Division for new equipment.
- B. Meet with Fleet Services and Materials Manager to identify specific needs and uses of equipment.

- C. Seek budget approval for purchase of new equipment.
- D. After budget approval is received and new budget year goes into effect, request purchase through the procurement process (PARM, Title II, Chapter 12, Section 12.04), attach or email a copy of specifications to the purchase request, and submit to Purchasing.
- E. A copy of bid award specifications must be sent to the Fleet Services Lead Service Technician to be used for delivery check in.

Any changes to specifications must be approved through the Fleet Services and Materials Manager prior to the request for purchase. Any equipment that does not meet specifications will be subject to delivery refusal until such discrepancies are rectified and/or approved by the Fleet Services and Materials Manager.

29.23 Fuel

Town employees assigned a vehicle are responsible for ensuring the fueling procedures are followed and reported as described in this policy. All employees have a responsibility to promote and monitor efforts to conserve fuel usage while conducting department approved tasks.

- A. Town-owned fuel site (Primary Fueling Source)
 - All town-owned vehicles and equipment are to be fueled from the unleaded pumps located at the fueling site across from the Service Center at 1105 Duncan Lane. (The only exception would be Fire Apparatus which have their own diesel tanks at each station.)
 - Key tags are issued for each vehicle and/or equipment by Fleet Services identifying its unique id number that is to be used when getting fuel.
- B. Fuel cards (Secondary Fueling Source)
 - In the event the town-owned pumps across from the Service Center are inoperable or inaccessible, utilize the Town's fueling card.
 - If traveling out of the metroplex area on business or training in a town-owned vehicle the fuel card can be used. The unit should be fueled up at the town-owned fueling site prior to leaving town.
 - Fuel cards are issued for each vehicle and/or equipment by Fleet Services and the correct card should be used for the vehicle it is assigned to.
 - All fuel cards need to be turned into Fleet at time of unit replacement.
- C. Town issued credit cards
 - In the event an employee is traveling out of the metroplex area on business or training in a town-owned vehicle and there are no participating fuel card providers, then the town issued credit card can be used.
 - In the event a town issued credit card is used to obtain fuel, it is the responsibility of the Department/Division to send a copy of the receipt(s) for all fuel purchases to Fleet Services identifying the unit number and the mileage at the time of the fill up per each fueling transaction.

Also see PARM, Title II, Chapter 22 – Vehicle/Equipment Replacement Policy

The Town of Flower Mound Fleet Policy and Procedures is hereby approved this 3rd day of November, 2020.

Signed (original located in HR Master File)
Debra Wallace, Interim Town Manager