

Title 34

GOVERNMENT CONTRACTS, PROCUREMENT AND PROPERTY CONTROL

Part XI. Fleet Management

Chapter 1. General Provisions

§101. Program Definition

A. Current Legal Authority. The Fleet Management Program for the state of Louisiana is established and operated under the authority given to the Commissioner of Administration by R.S. 39:361-363.

B. Mission, Goal, and Objectives of the Fleet Management Program

1. Program Mission Statement. The Fleet Management Program is established to provide motor vehicle, aircraft and related services to the state and to maintain safe, dependable, and cost-effective transportation for state employees who need designated types of vehicles or aircraft to perform their job responsibilities.

2. Program Goal and Objectives. To manage state provided transportation so as to reduce its cost and increase its benefit to state government by:

- a. establishing, reviewing, and revising statewide policies and standards for the Fleet Management Program;
- b. monitoring agency and vendor compliance with established policies and standards;
- c. financial planning in operations, maintenance, and capitalization of resources;
- d. identifying and adopting practices to maximize cost-effectiveness while maintaining proper vehicle and aircraft availability and utilization;
- e. receiving, investigation, and resolving all reports of abuse or misuse of fleet vehicles or aircraft.

C. Scope of the Fleet Management Program

1. Agency Scope. The state entities included in the scope of the Fleet Management Program are all agencies, boards, commissions, councils, departments, or other entities of the executive branch of government; all state colleges and universities; and all offices and entities of the judicial and legislative branches of government.

2. Vehicle Scope. To be included in the Fleet Management Program, vehicles or aircraft must be owned by the state or under lease by a state agency, and meet the criteria of either Subparagraph a or b below:

a. motorized and able to be licensed, with four or more wheels, whose primary use is surface transportation of passengers or delivery of small equipment and supplies;

b. motorized aircraft owned or leased by an entity within the scope of the Fleet Management Program except the Office of State Police. This scope includes:

- i. all automobiles, specifically: subcompact, compact, mid-size, full size, and station wagons;
- ii. all light duty pickup trucks (under 2 tons);
- iii. special use passenger vehicles-specifically: limousines, sport cars, ambulances, and motor homes (RV);
- iv. all cargo and passenger vans-mini through maxi;
- v. all busses;
- vi. utility trucks and carryalls (under 2 tons);
- vii. all motorized aircraft.

D. Definitions. For the purpose of these regulations, the following words have the meaning indicated.

Agency—any state entity as identified in §101.C.1. above.

Agency Head—use herein refers to statewide elected officials, the Commissioner of Administration, secretaries of executive departments appointed by the governor, presidents and chancellors of state colleges and universities and the equivalent position in the Office of the Governor, on state boards, commissions, and councils, or in the legislative and judicial branches.

Agency Property Manager—the employee designated by the agency head as the custodian of state property within the agency and who shall be responsible for all the property within his agency until his release from responsibility is approved by the commissioner.

Agency Transportation Coordinator—the employee designated by the agency head as the coordinator of fleet vehicles within the agency and who shall be responsible for any fleet management functions until his release from responsibility is acknowledged by the Commissioner of Administration.

Break-Even Mileage—the annual mileage traveled on official state business above which it is more economical to provide the employee with a personally assigned vehicle and below which, if there is not a pool vehicle available, it is more economical to reimburse the employee for use of the employee's personal vehicle.

Commissioner—the Commissioner of Administration.

Fleet Vehicles—vehicles that meet the criteria and scope as stated above in §101.C.2, Vehicle Scope of the Fleet Management Program.

Home Storage—the assigned off-duty storage location of the fleet vehicle is off state property and the vehicle is used for commuting, as defined by the Internal Revenue Service, by the individual to whom authorization for home storage is given.

Louisiana Property Assistance—that state agency within the Division of Administration delegated by the Commissioner of Administration as responsible for designated fleet management functions.

Luxury Vehicles—those vehicles equipped with non-essential, indulgent rather than necessity type options, which exceed state vehicle contract award, and enhance comfort and/or prestige.

Personal Assignment—the exclusive assignment of a fleet vehicle to one particular employee for permanent use in accomplishing the duties of the employee's position.

Personally Assigned Vehicle—a fleet vehicle assigned exclusively to one particular employee for permanent use in accomplishing the duties of his/her position.

Pool Vehicle—any fleet vehicle which is not a personally assigned vehicle is a pool vehicle. Pool vehicles are made available to state employees on a specific trip basis.

State Employee—any classified or unclassified employee of the state of Louisiana; any duly appointed member of a state board, commission, or advisory council; and any other person who has received specific approval from the Division of Administration to operate or travel in a fleet vehicle.

State Fleet Manager—the Commissioner of Administration or the person appointed by the Commissioner of Administration as responsible for the implementation, monitoring, and overall administration of the Statewide Fleet Management Program.

AUTHORITY NOTE: Promulgated in accordance with R.S. 39:361-363 and R.S. 39:1761-1771.

HISTORICAL NOTE: Promulgated by the Office of the Governor, Division of Administration, LR 13:15 (January 1987), amended by the Office of the Governor, Division of Administration, Property Assistance Agency, LR 38:1588 (July 2012).

§103. Functions of the Fleet Management Program

A. In accordance with the responsibilities and authority vested in the Commissioner of Administration by Sections 361 and 362 of Title 39 of the Louisiana Revised Statutes of 1950, as amended, inter-agency management of state-owned vehicles is the responsibility of the Division of Administration. The functions of the State Fleet Management Program shall include:

1. program planning:
 - a. long range planning for the Fleet Management Program. The state fleet manager shall be responsible for:
 - i. the continuous review of the scope of the Fleet Management Program including identifying and defining

vehicle types to be included in the program, reviewing the scope of agencies subject to the rules and regulations established by the Division of Administration, and reviewing the scope of the functions of the Fleet Management Program;

- ii. the review and evaluation of the overall Fleet Management Program objectives and revision of the objectives as needed;

- iii. the review and recommendation of proposed fleet management policies;

- iv. the review and recommendation of proposed legislation concerning fleet management;

- v. the development of operating and performance standards for fleet vehicles and establishment of minimum preventive maintenance requirements;

- vi. the development and maintenance of an operator's manual for fleet vehicles. This manual establishes minimum preventive maintenance procedures and instructions for the completion of the Daily Vehicle Usage Log (DOA form MV-3). It will include procedures for the safe operation of fleet vehicles and accident-reporting procedures as established by the Division of Administration, Office of Risk Management;

- vii. the development and maintenance of a directory of state fuel depots;

- viii. the development and maintenance of a directory of the agency transportation coordinators;

- ix. the development of performance evaluation standards for the Fleet Management Program;

- x. the definition and revision as required of the operational methods and procedures of the Fleet Management Program;

- xi. the recommendation of a plan for obtaining the resources needed by the Fleet Management Program to meet the goals and objectives of the program;

- b. annual planning for the Fleet Management Program. The state fleet manager shall be responsible for:
 - i. the assessment of state fleet vehicles. Annually, the state fleet manager shall calculate the break-even mileage and shall use this calculation to determine, after consultation with agency transportation coordinators, whether to retain, replace, or dispose of vehicles without replacement;
 - ii. the reevaluation of the rate by which employees are reimbursed for using privately owned automobiles to travel on state business;
 - iii. the annual evaluation of specifications for the purchase of fleet vehicles. The state fleet manager shall recommend to the director of state purchasing changes in the specifications for the purchase of new vehicles based on the previous year's experience with fleet operations. The Office of State Purchasing shall then develop said specifications and establish procedures for the purchase of new vehicles by

state agencies. These specifications shall exclude luxury automobiles;

c. non-essential options may not be added by the agency to the automobile after the purchase or lease of said motor vehicle except at the employees own expense and shall become the property of the state. The commissioner of administration shall authorize the purchase of any luxury or full-size motor vehicle for personal assignment by a statewide elected official other than the governor and lieutenant governor, such official shall first submit the request to the Joint Legislative Committee on the Budget for approval, as provided by R.S. 39:362.1.

2. Program Operations. The effective and efficient utilization and operation of the fleet vehicles requires the cooperation of the state fleet manager and all agencies within state government. Each agency head is ultimately responsible for the operation of the Fleet Management Program within the respective agency. Each agency head shall designate one individual as the agency transportation coordinator. The agency head shall submit the name, position, mailing address, and telephone number of this person to the state fleet manager by July 1, 1986 and update as changes occur. In order to more efficiently fulfill the responsibilities outlined in the rules and regulations, each agency head, with notification of and acknowledgement from the state fleet manager may designate appropriate employees in smaller organizational units as agency transportation coordinators. The successful operation of the Fleet Management Program is dependent on the following division of responsibilities.

a. Dissemination of Division of Administration Rules and Regulations. It shall be the responsibility of the state fleet manager to function as primary liaison with the agency transportation coordinators and to disseminate to the coordinators all statewide fleet management rules and regulations.

b. Vehicle Receiving

i. It shall be the responsibility of the Office of State Purchasing to insure delivery of all newly purchased state-owned fleet vehicles to Louisiana Property Assistance, except: state trooper cars, undercover cars, and DOTD vehicles.

ii. Upon delivery of newly purchased state-owned fleet vehicles to Louisiana Property Assistance, it shall be the responsibility of the state fleet manager to insure that:

(a). the vehicles are inspected for compliance with purchasing specifications;

(b). the vehicles are inspected to determine the condition of the vehicles at delivery;

(c). an operator's manual is inserted into each vehicle which will include all procedures for the safe operation of fleet vehicles and accident reporting procedures as established by the Division of Administration, Office of Risk Management as well as minimum preventive

maintenance procedures and instructions for the completion of the Daily Vehicle Usage Log (DOA form MV-3);

(d). the appropriate state identification is affixed to all fleet vehicles prior to their leaving the agency premises of Louisiana Property Assistance.

iii. It shall be the responsibility of the agency transportation coordinator to apply to the Department of Public Safety for vehicle license plates and to notify the state fleet manager, within 45 days of receipt, of both the license number and agency property tag number assigned to a new vehicle and any subsequent number changes which may occur.

c. Vehicle Disposal. Upon determination by the agency head that a vehicle is ready for disposal or determination by the commissioner that an under-utilized vehicle is subject to disposal without replacement, the vehicle shall be disposed of in accordance with Louisiana state law.

i. It shall be the responsibility of the agency property manager to prepare and forward to Louisiana Property Assistance Agency the State Property Transfer Form (DOA BF-11) requesting disposal of the vehicle.

ii. Upon receipt of the DOA form BF-11, the director of the Louisiana Property Assistance Agency shall be responsible for the review of the form and approval or disapproval.

iii. Upon notification from Louisiana Property Assistance that the transfer has been approved, the agency property manager shall notify the agency transportation coordinator who shall be responsible for the transfer of the vehicle to Louisiana Property Assistance.

iv. The state fleet manager shall establish procedures for the transfer of under-utilized vehicles to surplus.

d. Vehicle Assignment

i. No person may be authorized to operate or travel in a fleet vehicle unless that person is a state employee as defined in §101.D.14 above.

ii. No state employee of any agency may be assigned to operate a pool fleet vehicle or a personally assigned vehicle without the respective agency having on file a completed, signed and checked Louisiana State Employee Driver Safety Program Authorization/History form (DA 2054). The agency transportation driving coordinator shall be responsible for maintaining a file on all signed and completed DOA forms (DA 2054).

iii. No state vehicle owned or leased shall be used by a public or private individual for other than performing official state business. The personal use of a state-owned or leased vehicle is prohibited with the exception of home storage commute miles if approved by the Commissioner of Administration via the DOA form MV-2.

iv. Personal assignment of fleet vehicles is not permitted without specific approval from the Commissioner

of Administration via the DOA form MV-2. Criteria which merit request for personal assignment include:

(a). a state employee in a position which requires, in performance of assigned duties, that the employee drive in excess of the break-even mileage as established by the Commissioner of Administration. This mileage should accrue consistently throughout the year, not sporadically month to month;

(b). a state employee in a position of law enforcement who has the power to arrest and uses this power in the regular performance of his/her duties;

(c). a state employee in a position which requires, in performance of assigned duties, regular and unscheduled use of a special use vehicle or a vehicle with special equipment installed (e.g., hazardous waste spill investigation equipment, bar lights for use in emergency situations, handicapped driver equipment, etc.);

(d). statewide elected officials, the governor's executive counsel, the Commissioner of Administration, secretaries of executive departments, presidents and chancellors of state universities and colleges, and their equivalent in the judicial and legislative branches of government and vehicles purchased and assigned to the offices of statewide elected officials;

(NOTE: These will be approved pending submission of the requests on properly completed DAMV-2 forms in order to assure proper record keeping.)

(e). additional exceptions as may be granted by the Commissioner of Administration and the Joint Legislative Committee on the budget. Individual requests for such exceptions must be submitted in writing to the state fleet manager along with accompanying documentation which shows a history of need for the use of a fleet vehicle. The state fleet manager shall forward requests with recommendations to the Commissioner of Administration. All requests must be signed by the agency head and the agency transportation coordinator.

v. It shall be the responsibility of the agency transportation coordinator to insure that the Personal Assignment Agreement (DOA form MV-2) is completed, signed and approved by the commissioner prior to the personal assignment of a vehicle.

vi. Annually, it shall be the responsibility of the agency transportation coordinator to insure that a Personal Assignment Agreement (DOA form MV-2) is completed and forwarded to the state fleet manager by May 1 and is signed and approved by the commissioner in order to continue the personal assignment into the new fiscal year beginning July 1. Any personal assignment approved by the commissioner during the year shall expire June 30 and renewal will require submission of a Personal Assignment Agreement (DOA form MV-2) as described above. As an alternative to submitting individual MV-2 forms for employees who are requesting renewal of personal assignment and/or home storage approval for the next fiscal year, the state fleet manager may accept a listing of those employees who are currently

approved for personal assignment and/or home storage for update purposes. In order to be approved, the listing must consist of only those names of employees who have been previously approved on an individual MV-2 form, with current and correct information, and is on file with the state fleet manager and the originating agency. Any changes to the original information on the MV-2 form must be submitted on a new MV-2 form for approval at the time of the change. This list shall consist of the name of the employee, social security number of the employee, and vehicle identification number of the vehicle that is personally assigned and/or home stored. The list must be approved by the agency transportation coordinator and the agency head prior to submission to State Fleet Management.

vii. It shall be the responsibility of the agency transportation coordinator to insure that a personally assigned vehicle shall be made available for official use by other state employees when it would otherwise not be used and that such use is noted on the Daily Vehicle Usage Log (DOA form MV-3).

e. Vehicle Storage and Commuting Policies. Each fleet vehicle shall have a designated overnight storage site on property owned or leased by the state regardless of whether the vehicle is personally assigned or a pool vehicle, except as provided in §103.A.2.e.i below.

i. Home storage of fleet vehicles is prohibited unless required and/or permitted and approved by the Commissioner of Administration via the DOA form MV-2. Criteria which merit request for home storage include:

(a). law enforcement officers with the power of arrest who use this power in the regular performance of daily job duties and whose home storage of a fleet vehicle is deemed by their agency head to be in the best interest of public safety and law enforcement (required);

(b). employees for whom the provision of transportation to and from the workplace is a condition of employment as approved at the time of employment by the Commissioner of Administration (required);

(c). employees whose job duties require the use of special use vehicles or vehicles with special equipment installed outside of normal working hours and for whom home storage of such vehicles can be documented as either cost effective to the state or necessary to protect the safety and/or health of the public (required);

(d). statewide elected officials, the governor's executive counsel, the Commissioner of Administration, secretaries of executive departments, presidents or chancellors of state universities and colleges, and their equivalent in the judicial and legislative branches of government (permitted);

(e). additional exceptions as may be decided by the Commissioner of Administration and the Joint Legislative Committee on the budget. Individual requests for such exceptions must be submitted in writing to the state fleet manager along with documentation which demonstrates that home storage is in the best interest of the state. The state

fleet manager shall forward requests with recommendations to the Commissioner of Administration. All requests for exceptions must be signed by the agency head and the agency transportation coordinator (required/permitted).

ii. It shall be the responsibility of the agency transportation coordinator to insure that the Home Storage Agreement (DOA form MV-2) is completed, signed, and approved by the commissioner prior to allowance of home storage of any fleet vehicle.

iii. Annually, it shall be the responsibility of the agency transportation coordinator to insure that a Home Storage Agreement form (DOA form MV-2) is completed and forwarded to the state fleet manager by May 1 and is signed and approved by the commissioner in order to continue home storage into the new fiscal year beginning July 1. Any home storage approved by the commissioner during the year shall expire June 30 and renewal will require submission of a Home Storage Agreement (DOA form MV-2) as described above. As an alternative to submitting individual MV-2 forms for employees who are requesting renewal of personal assignment and/or home storage approval for the next fiscal year, the state fleet manager may accept a listing of those employees who are currently approved for personal assignment and/or home storage for update purposes. In order to be approved, the listing must consist of only those names of employees who have been previously approved on an individual MV-2 form, with current and correct information, and is on file with the state fleet manager and the originating agency. Any changes to the original information on the MV-2 form must be submitted on a new MV-2 form for approval at the time of the change. This list shall consist of the name of the employee, Social Security Number of the employee, and vehicle identification number of the vehicle that is personally assigned and/or home stored. The list must be approved by the agency transportation coordinator and the agency head prior to submission to State Fleet Management.

iv. It shall be the responsibility of the agency transportation coordinator to insure that a vehicle approved for home storage shall be made available for official use by other state employees when it would otherwise not be in use by the employee for whom storage is approved and that such use is noted on the Daily Vehicle Usage Log (DOA form MV-3).

f. Vehicle Operations. It shall be the responsibility of the agency transportation coordinator to insure that:

i. all drivers of fleet vehicles are familiar with and are in compliance with the procedures for safe operation of fleet vehicles, minimum preventive maintenance procedures, accident reporting procedures, and the completion of the Daily Vehicle Usage Log (DOA form MV-3) as set forth in the Fleet Vehicle Operator's Manual;

ii. any state employee that operates a fleet vehicle has a valid state license to operate that vehicle and has on file a completed and signed Louisiana State Employee Driver Safety Program Authorization/Driving History form

(DA 2054) and, when applicable, a Personal Assignment and/or Home Storage agreement (DOA form MV-2);

iii. all daily vehicle usage logs (DOA form MV-3) for both personally assigned and pool vehicles are approved by the appropriate supervisor and received by the agency transportation coordinator by the third working day of the month following the month to which the report pertains. The approving supervisor is responsible for auditing each respective DOA form MV-3. MV-3 data may be submitted monthly via magnetic media provided the information is formatted as required by the Division of Administration and the agency has received prior approval from the state fleet manager to submit data in this manner;

iv. preventive maintenance is performed on all fleet vehicles and recorded on the Preventive Maintenance Record (DOA form MV-4) or a maintenance form approved by the state fleet manager;

v. any additional duties which are required to monitor the utilization of fleet vehicles and to insure their most efficient and effective use shall be performed;

vi. when fuel is not available from a state-operated facility, self-service facilities shall be used for all purchases of fuel for state-owned or leased vehicles when utilizing commercial stations.

g. Maintenance of Files and Records

i. It shall be the responsibility of the agency transportation coordinator to insure that:

(a). a completed and signed Louisiana State Employee Driver Safety Program Authorization/Driving History form (DA 2054) is on file at the agency for every driver of fleet vehicles;

(b). all Personal Assignment and/or Home Storage Agreements (DOA form MV-2) are completed and forwarded to the state fleet manager for approval prior to the assignment of a personal vehicle to an employee, or the allowance of home storage and annually by May 1 thereafter;

(c). all Daily Vehicle Usage Logs (DOA form MV-3) containing accurate information on miles traveled, repair/maintenance costs, and operating costs, are completed, approved, and forwarded to the state fleet manager by the thirtieth day following the end of the month to which the report pertains;

(d). records are kept on all mileage reimbursement to state employees that have used privately owned vehicles to travel on state business. This reimbursement information shall be reported monthly to the state fleet manager no later than the thirtieth day following the end of the month to which the report pertains. A more extensive report on mileage reimbursement shall be filed with the state fleet manager for each fiscal year by the thirtieth day following the end of the fiscal year;

(e). an annual report is submitted to the state fleet manager by September 30 of each year containing the

following information for the preceding fiscal year concerning each aircraft owned or leased by the agency: type of aircraft, make, model, year, primary user, if any, mileage traveled or hours of use, annual rental or lease cost, if not purchased, or the purchase price;

(f). current and complete records concerning preventive maintenance (DOA form MV-4) on each fleet vehicle assigned to, owned by or used by the agency are completed and maintained in an agency file after review by the agency transportation coordinator for deficiencies.

ii. It shall be the responsibility of the Louisiana property assistance director and state fleet manager to insure that the following files are maintained and updated at the state level based on information supplied by the agency property managers and the agency transportation coordinators:

- (a). the fixed asset file;
- (b). the daily vehicle usage log file;
- (c). the personal assignment/home storage file;
- (d). the employee mileage reimbursement file.

h. Management Reporting. The state fleet manager shall be responsible for the preparation of the Commissioner of Administration's quarterly and annual reports on the status of fleet vehicles and aircraft to the Legislature. The reports shall present the information required by R.S. 39:362 and 363.

3. Program Control. It shall be the responsibility of the state fleet manager to insure that control is maintained over the operation of the Fleet Management Program.

a. Inventory. It shall be the responsibility of the state fleet manager to require all agency transportation coordinators to conduct an annual audit of the master listing of fleet vehicles for their respective agencies. The information provided will be used to verify that the vehicle information in fleet management's records correctly reflects the actual vehicles used by the agency and the pertinent characteristics of each fleet vehicle, and to verify the accuracy of records on personal assignment and home storage of fleet vehicles.

b. Monitor Policy Compliance. It shall be the responsibility of the state fleet manager to conduct random audits to verify agency compliance with the statewide policies regarding:

- i. personal assignment of fleet vehicles;
- ii. home storage of fleet vehicles;
- iii. employee mileage reimbursement for use of privately owned vehicles on state business;
- iv. minimum preventive maintenance standards as set forth in the Fleet Vehicle Operator's Manual.

c. Review Department Requests for Exception to Policy. All requests for exceptions to these rules and regulations shall be in writing and signed by the agency head

and the agency transportation coordinator and shall be forwarded with accompanying documentation to the state fleet manager. It shall be the responsibility of the state fleet manager to review all such requests for exceptions and forward the request with recommendations to the Commissioner of Administration.

d. Potential Abuse Investigation. It shall be the responsibility of the state fleet manager to insure that all reports of abuses in the use of state fleet vehicles are fully investigated. The state fleet manager shall, with cooperation of the appropriate agency transportation coordinator:

- i. receive and initiate a file on each abuse complaint;
- ii. gather facts about each case;
- iii. initiate appropriate action;
- iv. note completion of the investigation and action taken in the file;
- v. maintain the file on reported cases of abuse.

4. Program Evaluation. It shall be the responsibility of the state fleet manager to regularly evaluate the Fleet Management Program. The state fleet manager shall be responsible for:

- a. preparing budgetary requests and monitoring expenses of the Fleet Management Program;
- b. planning and conducting operational audits of agency fleet management programs and reporting all findings to the legislative auditor;
- c. planning and conducting all special projects. The state fleet manager shall be responsible for planning and conducting all projects designed to investigate problems within the state fleet management program or problems discovered during the operational audit of agency fleet management programs and developing solutions for these problems.

5. All other responsibilities involving the planning, operation, control, and evaluation of the Fleet Management Program not herein specifically retained by the Commissioner of Administration and the commissioner's designee, the state fleet manager, are hereby granted the respective agency heads. All such agency responsibilities must be conducted using methods and procedures consistent with the overall mission and objectives of the program established by the commissioner and in accord with these rules and regulations.

AUTHORITY NOTE: Promulgated in accordance with R.S. 39:361-363 and R. S. 39:1761-1771.

HISTORICAL NOTE: Promulgated by the Office of the Governor, Division of Administration, LR 13:15 (January 1987), amended by the Office of the Governor, Division of Administration, Property Assistance Agency, LR 13:742 (December 1987), amended LR 23:300 (March 1997), LR 38:1588 (July 2012).

§105. Nonexclusion

A. These regulations supersede and replace PPM 63 (LAC 4:V.Chapter 25) and all other previous regulations and exceptional permissions, both written and verbal. Any exclusion request shall be submitted to the commissioner through the state fleet manager for consideration. Any

exclusion from these regulations must be approved in writing by the commissioner.

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HISTORICAL NOTE: Promulgated by the Office of the Governor, Division of Administration, LR 13:19 (January 1987).

