Ohio Fiscal Academy

Capstone Project

Fleet Management: Reporting Best Practices

Cohort 6

Queens of Compliance

Della Carter

Sharon Flynt

Ellen Holt

Carmen Nelson

Kristin Rhee

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Executive Summary

Our capstone team saw a need for an updated and streamlined vehicle usage reporting process. Many of the current processes can be time-consuming, manual, and cumbersome. This report was produced to analyze and evaluate the vehicle usage and reporting processes currently in place at state agencies and to determine whether there is a need to improve and update them. Through our research of the Department of Administrative Services (DAS) Office of Fleet Management, specific state agency fleet management procedures, and two other states' fleet management systems, we have identified ways in which Ohio can be more efficient and uniform with reporting processes and accountability practices.

We interviewed various state agency fleet managers to research their vehicle usage and reporting processes. The agencies we interviewed were the Ohio Department of Transportation (ODOT), Ohio Department of Natural Resources (ODNR), Ohio Department of Rehabilitation and Corrections (ODRC), Ohio Department of Job and Family Services (ODJFS), and Office of the Ohio Public Defender (OPD). In addition to interviewing the fleet managers, we sent out a survey to various employees who utilize their agency's vehicles. We also conducted research on some of Utah's and Texas' fleet management programs.

There is not a standard, state-wide process for vehicle usage reporting. Our initial hypothesis was that the vehicle usage reporting process could be standardized and automated, eliminating reporting problems and enhancing vehicle monitoring and accountability. Instead, we found that there are many successful processes currently employed that meet the varying needs of state agencies. There may not be a "one-size-fits-all" solution to vehicle reporting, but there are many cases in which an agency could benefit from implementing portions of the successful processes used at other agencies.

Based on observations like this, our recommendation is to create a portal of best practices for DAS and state agency fleet managers. This portal will be a platform for state agency fleet managers and the state fleet administrator to use to raise questions and concerns to and with each other. This portal will also be a place for suggestions and discussions on how current and new fleet management software programs could be utilized to benefit the agencies in terms of efficiency and accountability.

We also recommend these additional reforms:

1. Reduce the manual steps in the reporting/tracking processes.
2. Utilize FleetOhio, the state's comprehensive fleet management information system, consistently and to its fullest functionality.
3. Take advantage of opportunities for additional training and better communication between DAS Office of Fleet Management and state agency fleet managers.

Introduction (Problem Statement)

Our team is composed of persons from different state agencies utilizing various vehicle and fuel reporting processes. One of these agencies monitors and maintains just one vehicle while another agency monitors and maintains over 17,000 pieces of active equipment. After preliminary research, we discovered that some agencies still rely heavily on manual reporting on travel logs or other handwritten documents. This current manual process is an example of outdated recordkeeping methods that can lead to duplication in data entry. We also discovered that many agencies do not have effective working relationships with the DAS Office of Fleet Management. Based on these observations, it seemed clear that there could be a need for a streamlined and updated vehicle reporting process that all agencies could utilize.

We examined various state agency processes, as well as other states' fleet management systems, and found some inefficiencies in vehicle usage reporting. In these inefficiencies, we saw an opportunity to make the reporting process more up-to-date with current technology. These discoveries, however, led us away from suggesting one streamlined way of reporting vehicle usage. Instead, we are suggesting that a best practices portal be created and implemented on the DAS website so that agencies and DAS fleet management can enhance communication, work together more cohesively, and help to identify updated tracking procedures. We feel that the success of this recommendation could be measured by agencies having simpler reporting processes and having better communication with DAS.

Background

According to Ohio Revised Code § 125.832, DAS is tasked with establishing and operating the states' fleet management program. As a part of this authority, DAS requires that state agencies, whether self-managed or DAS-managed, submit fleet data, including mileage and costs. Further, Ohio Revised Code § 125.832(K) states that the Director of DAS shall adopt rules for implementing the fleet management program that are consistent with known best practices. (Lawriter Ohio Revised Code)

The State Fleet Administrator, William Simon, articulated that the state currently uses Voyager Fleet Cards through the Fleet Commander Online management and reporting program to monitor fuel purchases and collect vehicle data. According to Mr. Simon, not all agencies consistently utilize this service nor do they submit the data in a timely manner. Additionally, state agencies use a fleet information management system called FleetOhio to capture and analyze data/costs associated with fleet management. However, not all of the functionalities of FleetOhio are being used, just the software that is applicable to the operation of the state fleet program. Mr. Simon said that the data is collected automatically when transactions are made and uploaded into the system on a weekly basis and the data is reviewed regularly for accuracy and trends. (Simon)

Because of the inconsistent use of the Voyager credit cards, the unused functionalities of FleetOhio, the ineffective communication between DAS and other state agencies, and the manual processes for reporting data, we decided to explore a different proposal. The best practices portal is a better recommendation than suggesting a streamlined way of reporting vehicle usage because it is more reasonable, attainable, and easier to implement. This portal could lead to a more uniform way of doing things, making agencies more efficient and successful with the monitoring and maintaining of vehicles.

Research Strategies

According to Mr. Simon, the fleet management program is functioning well but needs to continue to improve. One area that he says needs improvement is in how agency fleets are managed. Most of the agencies involved with the fleet program are DAS-managed but many are still maintaining their own fleets and are considered self-managed. He mentioned that these agencies do not always send their fleet plans on time, nor do they always update DAS with their operational changes. The most recent list of state owned/leased vehicles and participating agencies he sent our team includes over 12,432 vehicles, 39 DAS-managed agencies, 4 self-managed agencies, and 11 agencies in the process of transitioning to being DAS-managed or transitioning soon. DAS's goal is to shift all but a couple agencies to DAS-managed in the near future. Mr. Simon stressed the fiscal benefits to being DAS-managed as opposed to being self-managed, because DAS can focus on monitoring and maintaining the vehicles better. (Simon)

He also mentioned that the relationships between the agency fleet managers and the state fleet management office need improvement. He is not as concerned with how data gets to his department but more so with when it is submitted and how accurate it is for his reporting purposes. Mr. Simon stated that oftentimes fuel receipts are missing and that there is a lack of consistent data entry by some fiscal departments. Additionally, self-managed agencies are supposed to monitor cost per mile, the vehicle replacement plans, and motor pool usage. For many of the agencies, however, the follow-through is not there and the monitoring is not happening. Mr. Simon also expressed a need for a more updated distribution list of all agency fleet contacts that he could use to relay important fleet information on to and to avoid any issues with reporting. (Simon) The answers we received made it clear that our initial recommendation of having a streamlined vehicle reporting process was probably not the recommendation we wanted to move forward with.

As a result of our interview with Mr. Simon, our research strategy was to interview state agency fleet managers, and others involved with the agency fleet programs, to get a sense of how they track vehicle usage and how they feel their fleet program is working. We focused on ODOT, ODNR, ODRC, ODJFS, and OPD. We also sent a survey to staff of these agencies to get an idea of how well they perceive their agency's fleet processes. Finally, we chose Utah and Texas to seek fleet management information from and then compared their processes and programs with Ohio's.

OHIO

Ohio Department of Transportation

The Ohio Department of Transportation (ODOT) is an agency that has been very successful at being self-managed, according to Mr. Simon. Their follow-through with reporting and with communicating vehicle information has been very consistent and thorough. (Simon)

We interviewed Samuel Morrison, Fleet Management Section Manager, Nathan Mack, District #5 Fleet Manager, and Amanda Wellman, Senior Financial Analyst, to get their feedback on ODOT's fleet procedures. We discovered a wide variation among ODOT districts in the number and kinds of vehicles monitored as well as the methods by which vehicle usage is tracked and processed.

Throughout Ohio, there are 12 ODOT districts that serve the counties they represent and these districts all have different procedures and processes when it comes to vehicle usage reporting. With that being said, the entire agency utilizes an online fleet management software system called Enterprise Information Management System (EIMS). Vehicle usage and inventory, as well as fuel and maintenance parameters are tracked through this fleet module. ODOT does use the Voyager credit cards at commercial fueling stations and those transactions are entered into EIMS manually, but the primary source of fuel for ODOT vehicles is from the central tanking stations (agency owned fuel tanks and pumps), using a FuelMaster Fuel Management Unit (FMU). This equipment not only provides a daily automated report of vehicles fueled, but it also reports mileage, fuel amount, and driver information. The FMU collects data in two ways. An employee has to swipe their ID badge in both methods but information can either be automatically captured if a vehicle has an Automotive Information Module (AIM) installed in it, or the employee has to manually enter in the equipment #, mileage, and hours into the FMU. The data is currently manually entered daily into EIMS for tracking and cost purposes but this will eventually shift to an automatic interface, eliminating the need to enter anything at all. It should be noted that ODOT does not use the FleetOhio system that the other state agencies are required to use. They send their vehicle information to DAS based on EIMS data they collect (Morrison, Mack, and Wellman)

According to Mr. Mack and Mr. Morrison, they would like to see the EIMS system improved so that the data pulled is more accurate and easier to retrieve, and they would like to see the FMUs improve to eliminate errors when recording meter readings. Otherwise, they are very happy with how their fleet program operates. (Mack and Morrison)

ODOT PROCESS FLOW CHART:
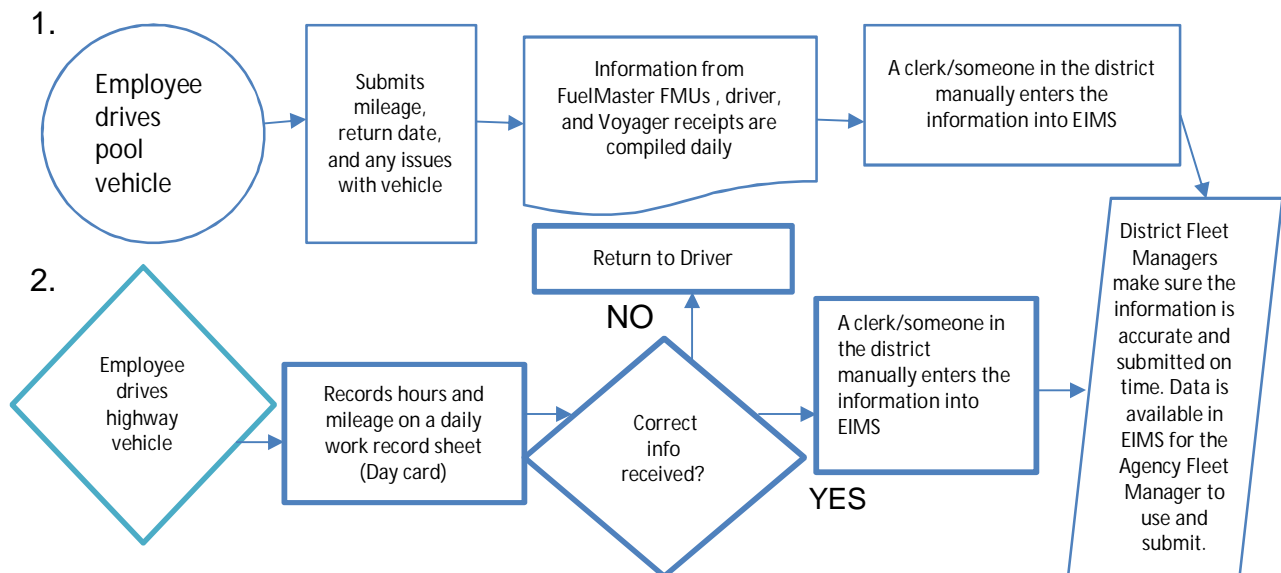
Ohio Department of Natural Resources

The Ohio Department of Natural Resources (ODNR) is another self-managed fleet agency, but Mr. Simon would like to see it transition to DAS management in the future. Specifically, he
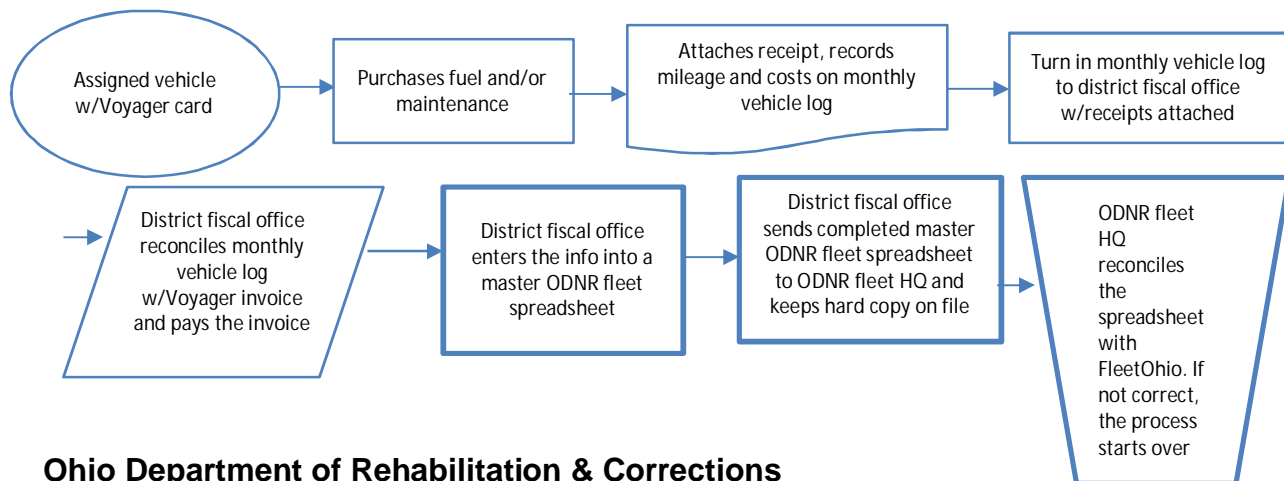
would like for there to be better communication between his office and theirs and to see that an improved system is in place for monitoring the central tanking stations and Voyager credit card usage. (Simon)

We interviewed Steve Van Fossen, Fleet Program Manager, Esteban Cueva, Motor Fleet Coordinator Supervisor, Emily Doran, Fleet Coordinator for the Division of Wildlife, and Kathleen McDaniel, Fleet Coordinator for the Division of Water. ODNR currently manages approximately 2,000 vehicles throughout 12 different divisions in all 88 counties of Ohio. Their fleet consists of SUV's, vans, trucks, cars and large agricultural-type vehicles like dump trucks and tractors. In addition, they have 4-wheelers and boats that require fuel to operate. Despite the different types of vehicles and divisions in ODNR, the process for fleet management is very similar throughout Ohio. Vehicles are typically assigned to a driver along with a Voyager card for fuel and maintenance purchases. The driver is responsible for their assigned vehicle and for reporting any gasoline purchases, maintenance done on the vehicle, and monthly mileage. The vehicle information is manually documented on a vehicle log and is backed-up by attaching all receipts to that log. The log is then turned in monthly to someone in their district fiscal office who checks on the paperwork and enters the information into a master spreadsheet. The data that is associated with the Voyager card and vehicle (fuel and/or maintenance purchases) uploads automatically and on a monthly basis into FleetOhio when the Voyager card is used. Every Voyager card must be reconciled monthly to the Voyager Vehicle Transaction Report. The purpose of the reconciliation process is to ensure accuracy of the charges between the receipts and the transaction report and to verify that no restricted items were purchased. (Van Fossen, Cueva, Doran, and McDaniel)

Like ODOT, ODNR maintains central tanking stations all over Ohio that are used for fueling vehicles; specifically, all of the agriculture equipment. Unlike ODOT, ODNR does not have fuel management units to document and track fuel withdrawals and mileage. ODNR staff have to manually document the fuel taken from the central tanking stations sometimes resulting in missed transactions and inaccurate entry of fuel data. Also, many officers have to travel to remote locations where the Voyager credit cards are not always accepted. (Van Fossen) For this reason, Payment Cards (the state's credit card used for miscellaneous purchases) end up being used for fuel purchases and, technically, they should not be, according to Mr. Simon. (Simon)

Based on our research, ODNR is a very unique agency when it comes to fleet management. They monitor and maintain a wide variety of vehicles and equipment that cannot always be fueled at commercial gas stations with Voyager credit cards, and many times the Payment Cards have to be used. It has been noted by both the DAS Office of Fleet Management and ODNR fleet program manager that better communication regarding specific needs of the agency and exceptions to the policies is needed. (Simon, Van Fossen)

ODNR PROCESS FLOW CHART:

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┌─────────────┐     ┌─────────────┐     ┌─────────────┐     ┌─────────────┐
│  Assigned   │     │ Purchases   │     │  Attaches   │     │ Turn in     │
│  vehicle    │ ──▶ │ fuel and/or │ ──▶ │ receipt,    │ ──▶ │ monthly     │
│  w/Voyager  │     │ maintenance │     │ records     │     │ vehicle log │
│  card       │     │             │     │ mileage and │     │ to district │
└─────────────┘     └─────────────┘     │ costs on    │     │ fiscal      │
                                         │ monthly     │     │ office w/   │
                                         │ vehicle log │     │ receipts    │
                                         └─────────────┘     │ attached    │
                                                             └─────────────┘

┌─────────────┐     ┌─────────────┐     ┌─────────────┐     ┌─────────────┐
│ District    │     │ District    │     │ District    │     │ ODNR fleet  │
│ fiscal      │     │ fiscal      │     │ fiscal      │     │ HQ          │
│ office      │ ──▶ │ office      │ ──▶ │ office      │ ──▶ │ reconciles  │
│ reconciles  │     │ enters the  │     │ sends       │     │ the         │
│ monthly     │     │ info into a │     │ completed   │     │ spreadsheet │
│ vehicle log │     │ master ODNR │     │ master ODNR │     │ with        │
│ w/Voyager   │     │ fleet       │     │ fleet       │     │ FleetOhio.  │
│ invoice and │     │ spreadsheet │     │ spreadsheet │     │ If not      │
│ pays the    │     │             │     │ to ODNR     │     │ correct,    │
│ invoice     │     │             │     │ fleet HQ    │     │ the process │
│             │     │             │     │ and keeps   │     │ starts over │
│             │     │             │     │ hard copy   │     │             │
│             │     │             │     │ on file     │     │             │
└─────────────┘     └─────────────┘     └─────────────┘     └─────────────┘
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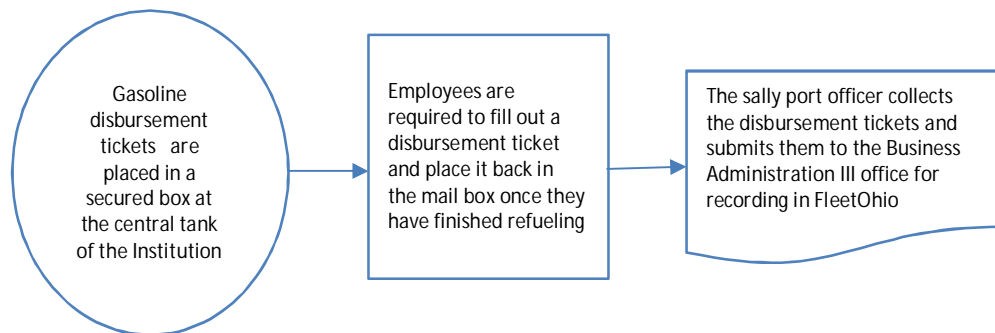## Ohio Department of Rehabilitation & Corrections

The Ohio Department of Rehabilitation and Corrections (ODRC) is another self-managed state agency that Mr. Simon has suggested becoming DAS-managed in the future. He has concerns with the communication between his office and theirs in terms of expectations and agency needs. (Simon)

We interviewed Scott Stevenson, Agency Fleet Administrator, Chris Vicker, Automotive Technician, Dawn Vencill, Business Administrator III, and David Agee, Administrative Lieutenant. The agency operates a fleet of 1,232 vehicles that are utilized to support various statewide functions and operations. The fleet is managed by a Fleet Administrator and operates under the reporting structure of the Division of Business Administration (DBA). The Fleet Administrator oversees fleet-related responsibilities in cooperation with the leadership of the agency's operational divisions, mainly correctional institutions, that are grouped into four regions. The DBA works with prison wardens and regional directors to develop fleet policies and procedures including expectations, replacement plans, and recordkeeping that are consistent with DAS policies and relevant sections of the Ohio Revised Code §125.832(G) and Administrative Code:123:6-1-04. (Lawriter Ohio Revised Code and Ohio Administrative Code) Wardens and regional directors, in turn, are responsible for executing the policies and communicating institution-specific fleet concerns with the DBA. (Stevenson, Vicker, Vencill, Agee)
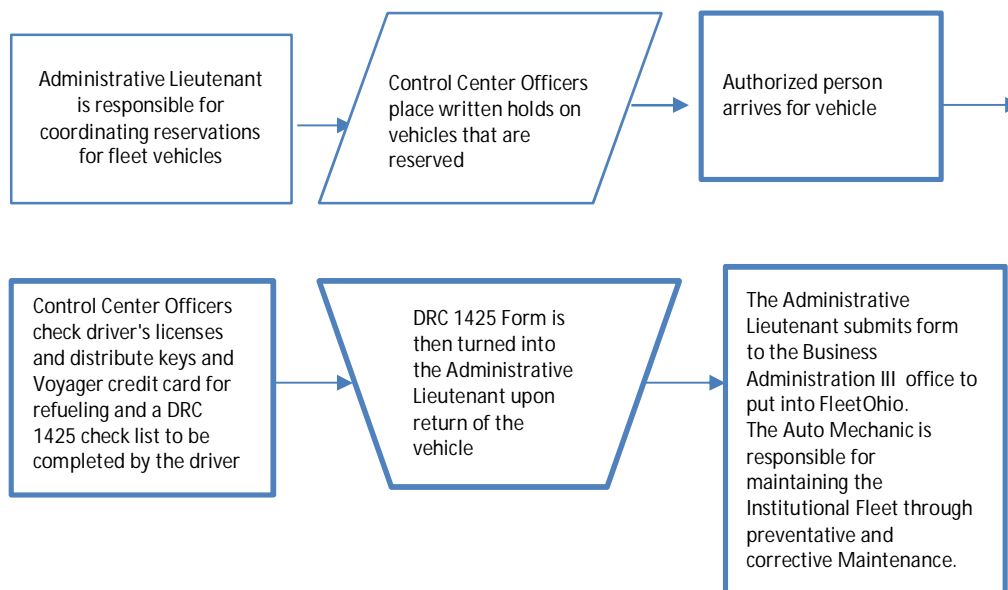
The ODRC, like all state agencies, is required to submit data to DAS for reporting purposes, including mileage, maintenance costs, fuel costs, and odometer readings. Some aspects of the reporting process may be different within the various regions but, overall, the process is similar because the agency is required to enter all of its data into the software program FleetOhio. The process for data entry into Fleet Ohio involves the manual input of paper records into electronic entries. The paper records used to populate these entries come from handwritten usage logs and the DRC 1425 forms (vehicle checklists) which travel with each vehicle and record odometer readings from every trip. Vendor expense receipts which record vehicle maintenance costs are also manually entered into FleetOhio. In addition to the data already mentioned, the data from Voyager card use is automatically uploaded into the FleetOhio database, too. Similar to ODNR, ODRC also manually enters central tanking station fuel withdrawals into FleetOhio. Unlike ODOT, fueling at ODRC central tanks is a low-tech process. There is no information

technology in place to help automate the recording and data entry of fuel transactions. Scott Stevenson mentioned the desire to utilize the Voyager credit cards at central tanking stations to be able to automatically record fuel withdrawals but that has not been explored yet. (Stevenson, Vicker, Vencill, Agee)

ODRC PROCESS FLOW CHART - Institution Central Tank

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┌────────────────┐      ┌────────────────┐      ┌────────────────┐
│  Gasoline      │      │ Employees are  │      │ The sally port │
│  disbursement  │      │ required to    │      │ officer collects│
│  tickets are   │ ───► │ fill out a     │ ───► │ the disbursement│
│  placed in a   │      │ disbursement   │      │ tickets and    │
│  secured box at│      │ ticket and     │      │ submits them to│
│  the central   │      │ place it back  │      │ the Business   │
│  tank of the   │      │ in the mail box│      │ Administration │
│  Institution   │      │ once they have │      │ III office for │
└────────────────┘      │ finished       │      │ recording in   │
                        │ refueling      │      │ FleetOhio      │
                        └────────────────┘      └────────────────┘
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ODRC PROCESS FLOW CHART- Fleet

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┌────────────────┐      ┌────────────────┐      ┌────────────────┐
│ Administrative │      │ Control Center │      │ Authorized     │
│ Lieutenant is  │      │ Officers place │      │ person arrives │
│ responsible for│ ───► │ written holds  │ ───► │ for vehicle    │ ───►
│ coordinating   │      │ on vehicles    │      │                │
│ reservations   │      │ that are       │      │                │
│ for fleet      │      │ reserved       │      │                │
│ vehicles       │      │                │      │                │
└────────────────┘      └────────────────┘      └────────────────┘

┌────────────────┐      ┌────────────────┐      ┌────────────────┐
│ Control Center │      │ DRC 1425 Form  │      │ The            │
│ Officers check │      │ is then turned │      │ Administrative │
│ driver's       │      │ into the       │      │ Lieutenant     │
│ licenses and   │ ───► │ Administrative │ ───► │ submits form to│
│ distribute keys│      │ Lieutenant upon│      │ the Business   │
│ and Voyager    │      │ return of the  │      │ Administration │
│ credit card for│      │ vehicle        │      │ III office to  │
│ refueling and a│      │                │      │ put into       │
│ DRC 1425 check │      │                │      │ FleetOhio.     │
│ list to be     │      │                │      │ The Auto       │
│ completed by   │      │                │      │ Mechanic is    │
│ the driver     │      │                │      │ responsible for│
└────────────────┘      └────────────────┘      │ maintaining the│
                                                 │ Institutional  │
                                                 │ Fleet through  │
                                                 │ preventative   │
                                                 │ and corrective │
                                                 │ Maintenance.   │
                                                 └────────────────┘
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Ohio Department of Job and Family Services

We interviewed Philip Anderson, Fleet Manager, and Freda Walker, Fleet Coordinator, to better understand the Ohio Department of Job and Family Services' (ODJFS) fleet management process. ODJFS has multiple departments and only some have vehicles assigned to them. Despite being a DAS managed agency, ODJFS fleet operations is handled by a fleet coordinator in each individual office and an agency fleet manager who oversees the entire fleet program. The agency fleet coordinators are also the Mileage Reimbursement Reduction Program Coordinators (MRRPC) and they collect information on two forms: the maintenance log (JFS09430) and the travel log (JFS09444). (Anderson, Walker)

The maintenance log contains the fuel and maintenance expenditure information and the travel log contains the information on the vehicle driven and the reason for the travel. The travel log is only seen by ODJFS and is only used for auditing purposes to show that the vehicles are being used properly for work-related purposes. The maintenance log is used to verify the expenditures that come from the Voyager credit card program. Both logs are collected at the end of every month by each MRRPC who sends copies to the ODJFS fleet manager for recordkeeping purposes only. (Anderson, Walker)

The MRRPC forwards the maintenance log, along with a cover sheet, to the DAS Office of Fleet Management. DAS receives the entire Voyager bill for ODJFS, pays it, and then distributes the sections of the bill and the ISTVs (a type of invoice that a state agency uses to pay another state agency for goods and services) to the appropriate fiscal offices in each county. The MRRPC reviews each log against the ISTV from DAS to ensure that the expenditures match. If they match, the ISTV is marked for payment by the fiscal officer. If it does not match, the MRRPC has to research the reason why the amount is over or under the logged amount. Many times, the amounts on the receipts do not match with what is on the ISTVs because of the fuel discounts on the Voyager invoices. Other reasons can include being double charged for a transaction, having a charge that was from a prior month, or missing a transaction that was charged too late in the month. Most of these discrepancies are handled in the MRRPC review process. (Anderson, Walker)

If there is a problem with the billing that cannot be explained, if an office gets billed for a vehicle that is not assigned to them, or if a vehicle is missing from the office report, the MRRPC contacts the ODJFS fleet manager to resolve the issue. Many times the problems deal with vehicles that are switched between offices in the middle of the month. Sometimes the problems require communication with the DAS Fleet Management Office to solve but, in most cases, the ODJFS fleet manager will either have a new ISTV generated or will just pay the portion in question. (Anderson, Walker)

The ODJFS uses the FleetOhio software for documenting travel and they use the FleetCommander program to check Voyager transactions but, according to Mr. Anderson, there seem to be untapped functionalities associated with both programs that are not being utilized and he believes that they could be helpful and possibly cut down on their process flow. (Anderson)

ODJFS PROCESS FLOW CHART:
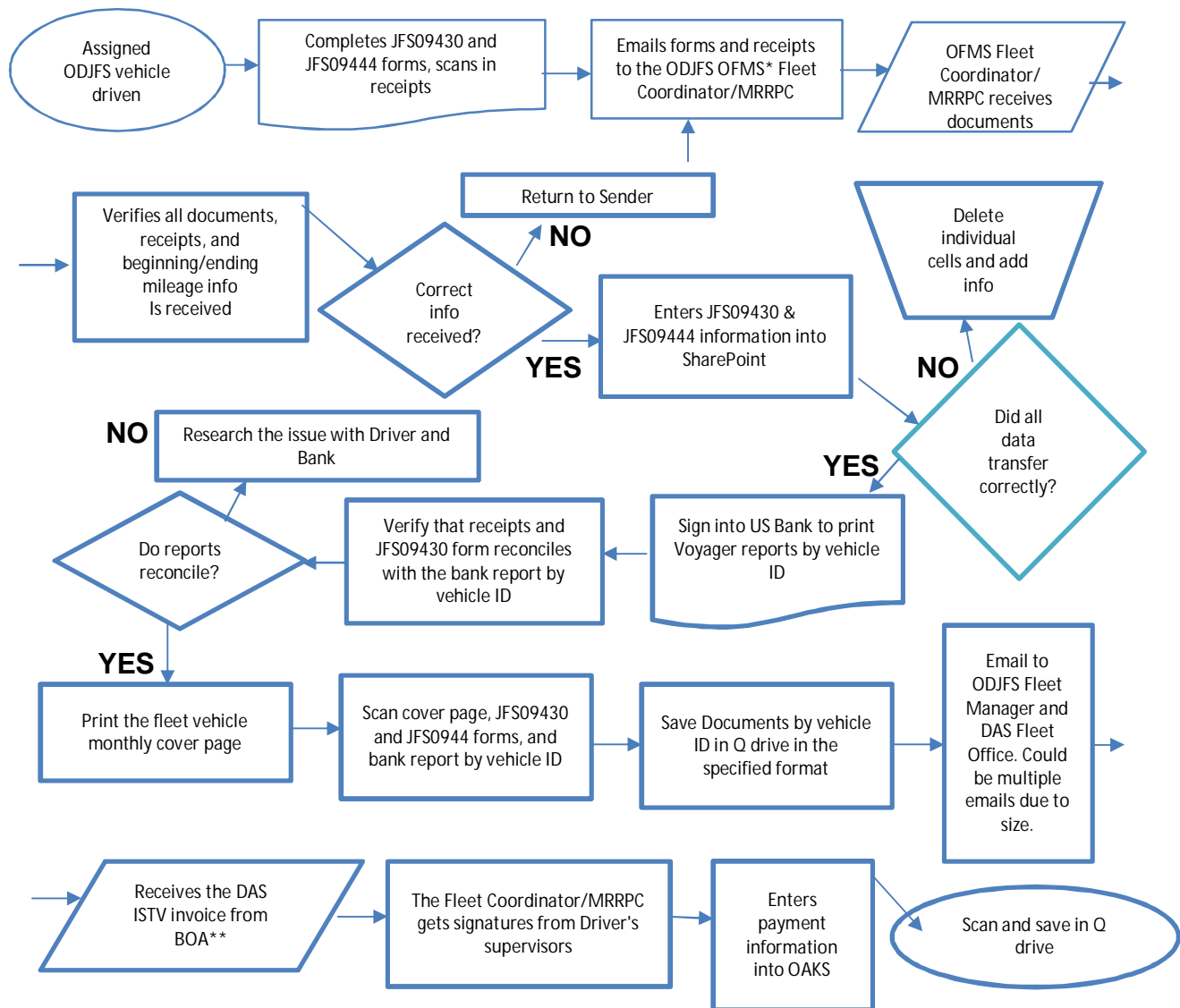
- · ***OFMS = Office of Fiscal Monitoring**
- · ****BOA = Bureau of Accounting within OFMS**

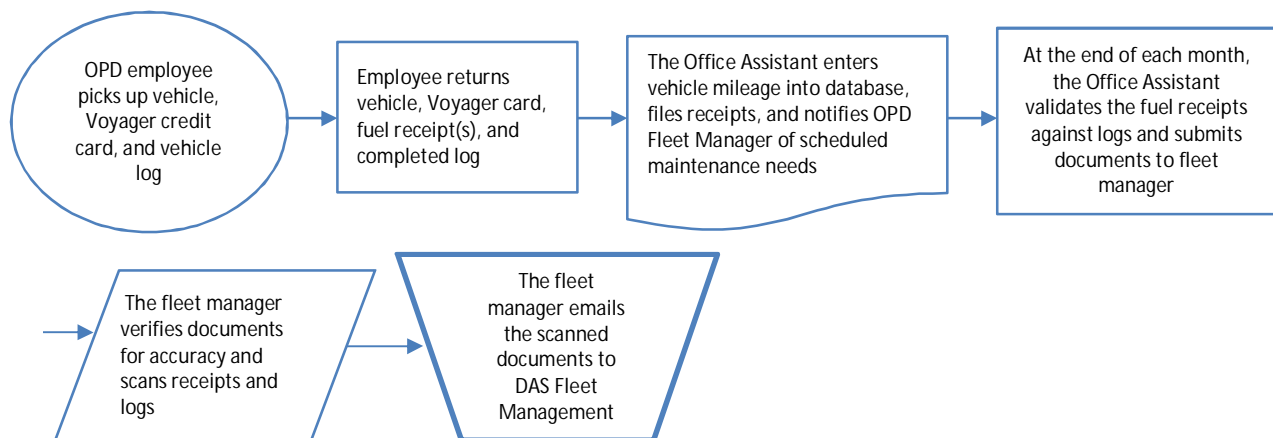## The Office of the Ohio Public Defender

The Office of the Ohio Public Defender (OPD) is another DAS-managed agency. It has 11 vehicles in its fleet, with one assigned to an off-site location. We interviewed Karen Keifel, Office Assistant, and Dennis Taylor, Program Administrator, to better understand their fleet process.

Drivers are required to request vehicles as needed and, upon returning, they must refuel the vehicle using the assigned Voyager card. Drivers must submit receipts, and write down beginning and ending mileage and destination on a travel log. An OPD office assistant will record and file any vehicle fuel receipts. At the end of each week, the office assistant enters each vehicle's total mileage into an Excel database. The database is programmed to notify the

office assistant if the vehicle is due for regular maintenance. If maintenance is warranted, the office assistant will notify the agency's fleet manager, who in turn schedules the vehicle for maintenance. At the end of every month, the office assistant validates the fuel receipts against the employee's documented vehicle logs and then submits everything to the fleet manager for further processing. (Kiefel and Taylor)

At the end of each month, the OPD fleet reporting process ends with the OPD Fleet Manager reviewing the information submitted by the office assistant for accuracy. The fuel receipts are then scanned along with the corresponding vehicle logs and sent to the DAS Office of Fleet Management. The OPD office assistant and fleet manager are both very satisfied with their agency's fleet reporting process. However, the fleet manager suggests that DAS Fleet Management sponsor trainings on a variety of fleet management/reporting topics that would benefit their program. (Keifel and Taylor)

OPD PROCESS FLOW CHART:

Survey Results

Vehicle Type

How often is mileage required to be reported?

How often is gas usage required to be reported?

Refueling

Rate agency's fleet reporting process
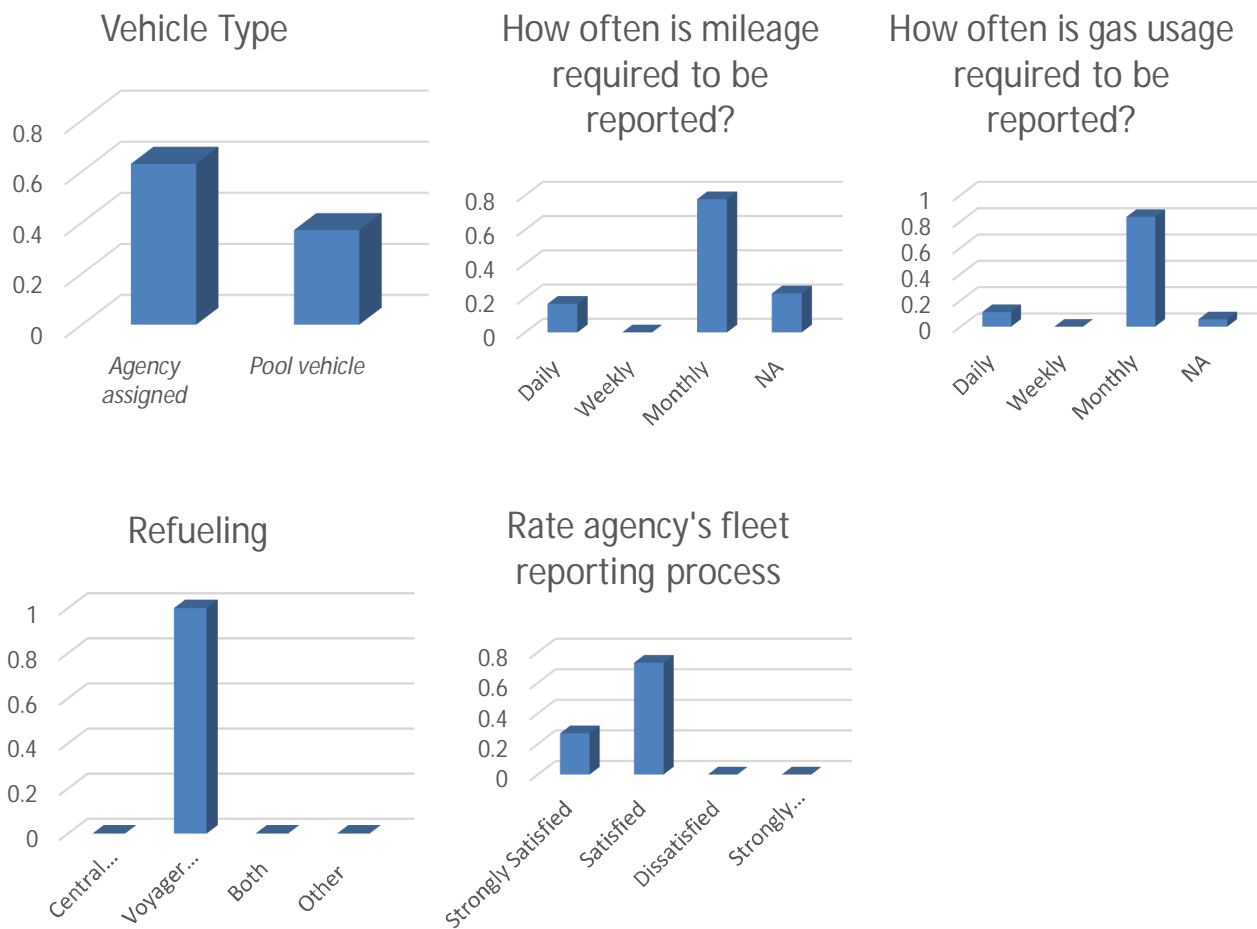
Some of the survey comments include the following**:**

- It would be nice if we didn't have to complete a monthly vehicle log as it is repetitive information. Everything is already on the receipt. The paper trail should be documented electronically when we utilize the Voyager card.
- Seems like duplication. Besides the mileage, all the information requested is printed on the gas receipt.
- The process is user friendly and easy for staff to use. Biggest negative is sometimes the Voyager card is not accepted at the pump. The problems with the gas cards have greatly reduced over the years.
- I am used to doing a motor vehicle report monthly - because that is what I have always done - it only takes a few minutes each month. Conversely, I wonder if there isn't a better way than keeping every signed hard copy of a receipt for gas on file somewhere.
- Overall I think it is a benefit to have a fleet vehicle. There is a definite benefit to not putting work miles and wear and tear on my personal vehicle. The positives outweigh the negatives.

- I feel the assigned cars reporting is too detailed, but I understand they need that type of detail for fleet vehicles driven by multiple users and the need to keep all reporting the same for analytical reasons.

The survey results yielded a 32% rate of response. 63% of the respondents are driving assigned vehicles and almost half of the respondents are driving vehicles daily. The majority of respondents report their mileage and gas refueling monthly, with almost half of the respondents still using a paper process to submit their reports. The majority of the responses were consistent with the team's expectations but the team was surprised to learn that all of the respondents were either satisfied or strongly satisfied with their agency's fleet vehicle reporting process. We were under the impression that more respondents would say that their agency's reporting process is too manual and that they would prefer a more streamlined way of entering data and submitting reports.

UTAH

In 2006, then-Governor Jon Huntsman announced an ambitious goal to increase Utah's overall energy efficiency by 20% by the year 2015. The Utah legislature responded to that proclamation and passed H.B. 110 which, among many things, reduced fleet costs and increased energy efficiency. The goal had powerful implications for all the state agencies but especially for the Division of Fleet Operations. (AssetWorks)

Utah's Division of Fleet Operations (FO) is the agency in charge of handling state vehicle acquisition, repair, preventive maintenance, surplus, and fueling for all vehicles. They provide support for over 60 agencies including the Department of Transportation, Department of Corrections, and the National Guard, and over 7,500 vehicles. The state has been a customer of AssetWorks for over ten years and uses the FleetFocus asset and maintenance management software application to manage its entire fleet of vehicles and equipment statewide. This comprehensive system tracks all functions related to the maintenance of vehicle equipment, including repair and preventive maintenance, parts inventory, and billing for equipment usage. FleetFocus tracks and stores all fleet data for the state, allowing Fleet Operations to maintain easy access to copious amounts of historical data about their fleet. FO is able to monitor miles-per-gallon and vehicle utilization to ensure that the fleet is running efficiently. The data is generated monthly and a quarterly report of each division's fleet is analyzed to understand trends. In order to be accountable and transparent, Fleet Operations shares its goals and quarterly fleet usage reports with stakeholders via their own secure website. Additionally, Fleet Operations publishes a list of fuel savings tips on its public website so both the agencies and the general public can improve their driving and fuel consumption habits. (AssetWorks)

The Utah Department of Transportation (UDOT), as mentioned above, is one of the many agencies under the FO's purview. They follow the FleetFocus guidelines for all of their equipment data but they use a State Financial System to make payments for purchases relating to vehicles and as the final budget accounting end for all programs or databases that are used. There are some components to their fleet process that import into FleetFocus and it is very well managed. According to Nicole Godfrey, Equipment System Specialist and Jeff Casper, Equipment Operations Manager, the agency communicates well with the FO office and the FO has realized that the version of FleetFocus is outdated. The state is moving towards a more web-based version which will make things more user-friendly. Finally, the FO does hold quarterly forums for all agency contacts to attend. These forums greatly increase the

communications relationship between all of the state agencies who have a fleet management program. (Godfrey and Casper)

TEXAS

The state of Texas has a centralized fleet management system administered and managed by the Texas Division of the Comptroller of Public Accounts. The Texas Fleet System has over 28,000 vehicles that are distributed amongst 98 state agencies, colleges, and universities. The Comptroller's office contracts with Agile Assets to provide a fleet management software system, the Texas Fleet Management System (TxFS). This system is designed to capture and maintain data on each vehicle in the state's fleet. TxFS offers state agencies a strong web based reporting capability, an ease of use for end-users, the ability to efficiently import data from different systems or external files, and the ability to design specific reports and queries. (Walton)

Agencies are required to report fleet inventory, vehicle purpose, fuel consumption and cost, mileage, fleet maintenance, and other fleet related data but they are free to determine the method in which they use to report this data. The fifth largest agency fleet system, the Department of Aging and Disability Services chooses to report their monthly data manually using Excel spreadsheets and data obtained from their Voyager card system. The Department researched the feasibility of fully automating their fleet using a fleet management software system and GPS, but their research showed that it would take over 45 years to realize a return on their investment. (Ponnaiya)

In 2014, one of the larger state agencies, the Department of Transportation (TxDOT), implemented a comprehensive fleet management software program, Fleet Navigator (FNAV), to replace its aging Legacy System. FNAV provides TxDOT with many components including telematics from GPS units installed in over 12,000 fleet vehicles (NetworkFleet). The usage data from these units is uploaded directly from the vehicle to the software system, eliminating any need for manual recording. NetworkFleet is the core fleet management system that tracks fleet assets and all repairs, and FuelFocus tracks total fuel used at over 270 central tanking station sites, as well as captures accurate meter readings. This newer system tracks usage more accurately and also tracks preventive maintenance activities, early repair alerts, vehicle life analysis, and other functions. The agency has already seen improved data on repairs, parts, and preventive maintenance, as well as a reduced paperwork burden. (Waldrip, Pratt)

At the core of Texas' fleet management program is their training and communication. From its inception, the Comptroller's fleet management program and Agile Assets have conducted training classes to educate the staff of the Comptroller's office and designated agency fleet managers. The Comptroller's office also provides ongoing trainings as a refresher and as a part of the onboarding process for new agency fleet managers. Finally, the Comptroller's office relies on continuous process improvements as identified through feedback and communication with the state agencies to improve their service to them, increase customer satisfaction, and ultimately, help the State of Texas achieve a return on its investments. (Walton)

Findings

Analysis

Based on our research, we found that agencies have very different ways of managing their fleet programs. We also found that some agencies are satisfied with their processes while others wish they could eliminate some steps and have more simplified procedures. Our first inclination was to come up with a statewide way of tracking vehicle usage that would make documenting and collecting data easy for everyone. What we discovered, however, was that agencies are too different from each other to prescribe one way of doing things. Some agencies are very small and would not need in-depth procedures while some agencies are broken up into offices throughout Ohio and, therefore, would be very hard to monitor with just one person in charge or with one process in place.

We also found that agencies would like to have better communication with the DAS Office of Fleet Management (and vice versa), and that some agencies have processes in place that could work well in other agencies, if they only knew about them.

Here are the main highlights from our research:

1. ODOT has been able to successfully manage their fleet program by using a fleet management software program and fuel management system instead of FleetOhio. DAS and ODOT communicated well so that this exception could be made. ODOT worked within its budget to be able to acquire a more state-of-the-art fuel management system that they will see a financial savings on over the years.
2. ODNR would like to have a better relationship with the DAS Office of Fleet Management so that their agency fleet needs can be met. There are specific ways in which ODNR is different from other state agencies and exceptions to the DAS policies are needed.
3. ODRC is another agency with a fairly large fleet. They would like to become more up-to-date with technology and would like to work better with DAS to come up with some solutions.
4. ODJFS has a lengthy vehicle tracking process in place that involves having a Mileage Reimbursement Reduction Program Coordinator (MRRPC) at each office that is assigned a vehicle. If there was an elimination of the manual processes, there could be a significant amount of time freed up for the MRRPC.
5. Texas and Utah seem to have effective working relationships between their fleet management offices and state agency fleet managers. There appears to be ongoing communication between the offices about trends in fleet management, and training opportunities for incoming and established fleet managers.

ODNR, specifically, finds that most users of their vehicles are content with the reporting process they have in place, but some offices are using their own databases and spreadsheets to retrieve information. If more functionalities of FleetOhio could be used, perhaps the different formats could be eliminated, offering one database that could be used by all of the offices. The agency would also like to see an opportunity for better communication between their office and DAS, possibly through a fleet portal where inquiries can be documented and updated website information can be found.

ODRC finds that using fleet vehicles is a great financial benefit to the institutions. They save a lot of money by avoiding costly mileage reimbursements to their employees when they attend trainings and other work-related events. They would like to explore a different way of maintaining, reserving, and processing vehicle usage, however. Preparing and submitting the required documentation is time consuming for several staff members. There seems to be an opportunity for ODRC to update their technology with a telematics system so that they can collect accurate and timely data for fleet reporting purposes.

Based on our follow-up interview with Mr. Simon, the DAS Fleet Management Office administers the states Certified Fleet Manager's Program (CAFM) to those agencies that would like to manage their own fleets. The program offers training courses online, as well as written materials to study and prep for the certification tests. The tests are taken on site at the DAS Surface Road location, with a proctor present. It is unclear how well this certification program is advertised to state agencies, however. Mr. Simon also revealed that DAS is in the process of upgrading their website to make it more interactive and user friendly. (Simon)

Conclusion

Recommendations

Although it was not what we had intended to recommend, our team would like to offer a best practices portal on the DAS website. This portal would be a platform for state agencies and the DAS Office of Fleet Management to use to foster better communication regarding specific fleet needs. Agency fleet managers can post their ideas and/or start a discussion on a particular fleet issue. An additional benefit to this portal is having transparency between the management office and state agencies. When common issues and problems are brought to light, the quicker it is to identify and prioritize remediation.

We think that the portal would be a great place for more job aids to be located and easily accessed. ODNR mentioned that having a job aid on how to salvage vehicles would be helpful. Currently, there is a job aid for FleetOhio in the FleetOhio section of the DAS fleet website but one suggestion would be to add that to the portal instead. We also think that moving the Motor Pool Reservation instructions to the portal would be useful. Finally, this would be an ideal place for management to share policy updates with other agencies.

One of the other possible ways this portal would be helpful is having ODOT share why their fleet management program is so successful and how they were able to acquire state-of-the-art fuel and vehicle tracking equipment. Their process might be helpful to ODNR and ODRC who have central tanking stations and also have unique vehicle conditions.

We have taken the current DAS Fleet Management website and added a link to the Best Practices Portal. The following are screenshots of where the portal would be located on the website, as well as what the portal would look like if it was implemented:

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BEST PRACTICES PORTAL

Welcome to the DAS Office of Fleet Management's Best Practices Portal. This resource is available to all state agencies participating in the fleet management program. Please share your ideas and your agency's successful practices with each other and comment on the positives or negatives of a posted best practice. You can discuss a challenge with your peers and subject matter experts. This is the platform to ask DAS fleet management questions that are important to you. The Office of Fleet Management wants to make sure that the correct people are being notified of important fleet updates. Please <u>click here</u> to make sure your agency contact information is updated.

| SHARE A BEST PRACTICE HERE | JOB AIDS | DISCUSS AN ISSUE HERE |

CLICK HERE FOR FLEET MANAGEMENT UPDATES

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