



February 19, 2003

Agency Secretaries  
Boards and Commissions  
Department Directors

In accordance with Cabinet Secretary Daniel Zingale's directive dated February 5, 2003, a ban is imposed on all state vehicle purchases for non-emergency use until further notice, and 600 vehicles were ordered idled. The Department of General Services (DGS) is taking action to ensure compliance with this directive. An assessment is now required to determine the appropriate size of the State's fleet.

#### **EXEMPTION PROCEDURE FOR ACQUISITION OF VEHICLES**

The DGS, Office of Fleet Administration (OFA), has developed an exemption procedure for purchasing vehicles necessary for the protection of health and safety or security of the public. Enclosed is a copy of these procedures as well as a newly developed vehicle acquisition form to allow for uniform acquisition tracking. These are available for your immediate use.

Currently, several departments have formal delegations for vehicle acquisition. Under separate cover, these departments will be receiving direction as to a revised vehicle acquisition delegation process.

#### **ASSESSMENT OF THE STATE'S FLEET**

OFA has idled 600 of its daily use vehicles throughout the state while a statewide assessment is conducted of the monthly leased vehicles and other departmental fleets. Enclosed is an inventory of OFA's leased vehicles assigned to your Agency, Department, Board or Commission for your review and assessment as to whether these vehicles are necessary to meet the critical business needs of your department. Please identify the designated driver assigned to each vehicle listed on the attached inventory and provide the results of your assessment to OFA. In addition, please submit an updated Monthly Assignment of Vehicle Form (OFA Form 54) to OFA for the following non-standard leased vehicles: Sport utility vehicles (SUV), four-wheel drives, station wagons, mid-size sedans (greater than 110 cubic feet interior space), and non-police package full-size sedans.

For departments that purchase or lease their own vehicles, please submit an inventory of your vehicles to OFA and an assessment as to whether these vehicles are necessary to meet the critical business needs of your department. Again, include the designated driver assigned to each vehicle with your inventory. (Authority GC 14600).

Additionally, departments are reminded of the policies on defensive driver training and home storage permits as follows:

### **Defensive Driver Training**

All state employees are required to attend Defensive Driver Training every four years if they drive any vehicle for state business. This includes state vehicles, rental cars and personal vehicles. To enroll, please contact the Office of Risk and Insurance Management at (916) 376-5311 or visit the website at <http://www.orim.dgs.ca.gov/training/ddinfo.html>.

### **Home Storage Permit**

Agencies, Boards, Commissions and Departments are responsible for monitoring, approving and maintaining a current Vehicle Home Storage Request/Permit (STD 377) for the storage of state-owned mobile equipment at a state employee's home. A permit is required when a vehicle is stored at or near an employee's home for more than 72 nights over a 12-month period or more than 36 nights over any three-month period.

Annual reports are due to OFA by June 30, and must include the total number of home storage permits and the name of the Agency, Department, Board and Commission contact. (Authority GC 19993.2 and DPA 599.808(d)).

We appreciate your participation in this assessment of the State's fleet. The information you provide will be vital in evaluating the State's fleet and developing a statewide plan of action. Please provide the information we have requested to Debra Bouler, Chief, Office of Fleet Administration, by March 14, 2003. If you have any questions or need additional information, please contact her at (916) 327-2007 or email [debra.bouler@dgs.ca.gov](mailto:debra.bouler@dgs.ca.gov).

Sincerely,



Clothilde V. Hewlett, Interim Director  
Department of General Services

Enclosures

cc: Daniel Zingale, Cabinet Secretary, Governor's Office  
Deborah Hysen, Acting Chief Deputy Director, Department of General Services  
Jacqueline R. Wilson, Deputy Director, Interagency Support Division  
Debra Bouler, Chief, Office of Fleet Administration

## EXEMPTION PROCEDURES FOR ACQUISITION OF VEHICLES

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### Change

On February 5, 2003, the Governor's Office imposed a ban on the State's purchase of new vehicles for non-emergency use. Exceptions to the ban must be approved by the director of the Department of General Services on the basis of an urgent need to protect the health and safety or security of the public.

**Note: Exceptions continue to require adherence to the State's vehicle purchase policy outlined in Management Memo MM 02-21.**

[http://www.documents.dgs.ca.gov/osp/sam/mmemos/mm02\\_21.pdf](http://www.documents.dgs.ca.gov/osp/sam/mmemos/mm02_21.pdf)

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### Authority

#### California Government Code

**13332.09.** No purchase order or other form of documentation for acquisition or replacement of motor vehicles shall be issued against any appropriation until the Department of General Services has investigated and established the necessity there for. No surplus mobile equipment may be acquired from any source by any state agency for program support until the Department of General Services has investigated and established the necessity there for.

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### Exception Process

**All state agencies requesting an exception to the Governor's vehicle purchasing ban shall submit the following documents to the Office of Fleet Administration for review and approval:**

1. A completed Purchase Order (Std. 65) or Purchase Estimate (Std. 66) for replacement or additional vehicles.
  2. A Property Survey Report (Std. 152) for replacement vehicles approved by the local Inspector of Automotive Equipment.
  3. An Office of Fleet Administration Vehicle Acquisition Request Form (see attachment) approved by the local Inspector of Automotive Equipment.
  4. A completed Passenger Vehicle Usage Certification (Std. 276A).
  5. A current copy of any delegation or exemption (issued by any state entity to the requesting agency) relating to vehicles, mobile equipment or fleet management.
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### Responsibility

It is the responsibility of the requesting department director or agency secretary to certify the need for an exception to the vehicle purchasing ban.

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**Where to Submit**

Submit the documents listed above to The Department of General Services, Office of Fleet Administration at 802 Q Street, Sacramento, California, 95814 (Attention: Steve Nielsen).

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**Questions and Answers**

**Q:** Can agencies purchase used vehicles and not be affected by the ban?

**A:** No. Purchasing any new or used vehicle is banned without an approved exception from the Department of General Services.

**Q:** Is approval necessary to acquire vehicles as gifts, purchase through the Office of Criminal Justice Planning, or through re-utilizing surplus vehicles from another agency or the federal government?

**A:** Yes. All vehicle acquisitions require the Department of General Services approval prior to being obtained from any source regardless of cost (See Government Code Section 13332.09).

**Q:** If an agency has already placed a vehicle order prior to the ban is an exception required to take possession when the vehicle arrives after the date of the ban?

**A:** No. Any vehicle purchase orders that were submitted, approved and placed with vendors prior to the date the ban was imposed do not require an exception.

(Further questions can be directed to any of the contacts listed below)

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**Contact Information**

Steve Nielsen, Statewide Mobile Equipment Coordinator  
Department of General Services  
Office of Fleet Administration  
e-mail: [steve.nielsen@dgs.ca.gov](mailto:steve.nielsen@dgs.ca.gov)  
Telephone: (916) 327-2082

Richard Shedd, Assistant Chief  
Department of General Services  
Office of Fleet Administration  
e-mail: [richard.shedd@dgs.ca.gov](mailto:richard.shedd@dgs.ca.gov)  
Telephone: (916) 327-2083

Debra Bouler, Chief  
Department of General Services  
Office of Fleet Administration  
e-mail: [debra.bouler@dgs.ca.gov](mailto:debra.bouler@dgs.ca.gov)  
Telephone: (916) 327-2007

**RETURN COMPLETED FORM TO:**  
 DEPARTMENT OF GENERAL SERVICES  
 OFFICE OF FLEET ADMINISTRATION  
 800 Q STREET, SACRAMENTO, CA 95814  
 ATTN: STATEWIDE EQUIPMENT COORDINATOR

## Vehicle Acquisition Request Form

<b>DEPARTMENT:</b>	<b>DIVISION / OFFICE:</b>	<b>BILLING CODE:</b>
<b>REQUESTOR:</b>	<b>POSITION:</b>	
<b>OFFICE ADDRESS:</b>	<b>CITY / ZIP:</b>	<b>TELEPHONE NUMBER:</b>

<b>TYPE OF VEHICLE(S):</b>	<b>QUANTITY:</b>
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<b>SPECIAL REQUIREMENTS:</b>
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<b>ITEMS TO INCLUDE WITH REQUEST FORM:</b> 1. A COMPLETED PURCHASE ORDER (STD. 65) OR PURCHASE ESTIMATE (STD. 66) FOR REPLACEMENT OR ADDITIONAL VEHICLES 2. AN APPROVED PROPERTY SURVEY REPORT (STD. 152) <u>FOR REPLACEMENT VEHICLES</u> 3. A CURRENT COPY ON FILE WITH THE OFFICE OF FLEET ADMINISTRATION OF THE PASSENGER VEHICLE USAGE REPORT (STD. 276A) 4. A CURRENT COPY ON FILE WITH THE OFFICE OF FLEET ADMINISTRATION OF ANY DELEGATION OR EXEMPTION (ISSUED BY ANY STATE ENTITY TO THE REQUESTING AGENCY) RELATING TO VEHICLES, MOBILE EQUIPMENT OR FLEET MANAGEMENT
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<b>JUSTIFICATION FOR VEHICLE: (USE ADDITIONAL FORMS IF NECESSARY)</b>

<b>BUSINESS SERVICE OFFICER/BUYERS SIGNATURE:</b>	<b>DATE:</b>
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I HEREBY CERTIFY THAT THE ABOVE IS A TRUE STATEMENT OF SAID VEHICLES AND WILL BE USED IN ACCORDANCE TO THE JUSTIFICATION LISTED ABOVE.

<b>REQUESTING AGENCY'S DIRECTOR APPROVAL:</b>	<b>DATE:</b>
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I HEREBY CERTIFY THAT THE ABOVE IS A TRUE STATEMENT OF SAID VEHICLES AND WILL BE USED IN ACCORDANCE TO THE JUSTIFICATION LISTED ABOVE.

<b>OFA STATEWIDE EQUIPMENT COORDINATOR:</b>  <div style="text-align: center;">           APPROVED <input type="checkbox"/>      DISAPPROVED <input type="checkbox"/> </div>	<b>DATE:</b>
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<b>DGS DIRECTOR:</b>  <div style="text-align: center;">           APPROVED <input type="checkbox"/>      DISAPPROVED <input type="checkbox"/> </div>	<b>DATE:</b>
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