

## Fleet Acquisition Submittal Requirements Checklist

July 2013

Pursuant to Government Code Section 13332.09, the Department of General Services (DGS) is required to investigate and establish the necessity of a fleet asset before a State agency makes any type of acquisition. State agencies are required to seek approval from DGS/Office of Fleet and Asset Management (OFAM) prior to acquiring any fleet asset (see Management Memo 13-01 for exceptions). This includes purchasing new or used, leasing long-term commercially (including equipment) or through DGS, obtaining surplus assets, or receiving assets as a donation or gift.

Fleet acquisition plan submittals must be submitted by the first work day of April each year. Any plan amendments must be submitted no later than 45 days prior to the vehicle manufacturer's cut-off date or the end of the fiscal year. Any fleet acquisition plan submittals requesting a one-time buy (purchase estimate) must be submitted by the first work day of February.

The following items must be submitted and are necessary for the request package to be deemed *complete* by the OFAM. These forms can be accessed on the OFAM Web site at [www.dgs.ca.gov/ofam](http://www.dgs.ca.gov/ofam):

### REPLACEMENT VEHICLES

#### REQUIRED DOCUMENTS

- Fleet Acquisition Certification**  
Must be signed by the Agency Secretary and Department Director.
- Fleet Acquisition Plan (written plan)**
- Fleet Acquisition Plan Spreadsheet**  
Excel spreadsheet submitted concurrently with the written Fleet Acquisition Plan.
- Property Survey Report, STD. 152**  
Required to be submitted prior to PO approval.
- Purchase Estimate, STD. 66**  
For one-time purchases, the STD 66 must be submitted with the fleet acquisition plan and include the *item number* from the fleet acquisition plan spreadsheet.
- Purchase Order, STD. 65**  
Can be submitted after fleet acquisition plan approval. Must include the *item number* from the fleet acquisition plan spreadsheet.
- FAMS Updated**  
All fleet assets must be entered into FAMS. Updates to inventory and monthly usage and fuel data must be submitted by the 15<sup>th</sup> of each month.

#### AS NEEDED

- Equipment Inspection Report, OFA 6**  
Approved and completed by your local OFAM Inspector of Automotive Equipment. If required, must be submitted prior to PO approval.
- Property Transfer Report, STD. 158**  
Complete if reutilizing an existing asset from another state agency.
- Fire Truck Questionnaire**

### ADDITIONAL VEHICLES

Complete supplemental questions if requesting to replace fire engines.

#### REQUIRED DOCUMENTS

- Fleet Acquisition Certification**  
Must be signed by the Agency Secretary and Department Director.
- Fleet Acquisition Plan (written plan)**
- Fleet Acquisition Plan Spreadsheet**  
Excel spreadsheet submitted concurrently with the written Fleet Acquisition Plan.
- Justification for Additional Assets**  
Provide BCP's or the Governor's budget that shows authorization to add additional fleet assets and/or personnel or other justification for adding assets to the fleet.
- Purchase Estimate, STD. 66**  
For one-time purchases, the STD 66 must be submitted with the fleet acquisition plan and include the *item number* from the fleet acquisition plan spreadsheet.
- Purchase Order, STD. 65**  
Can be submitted after fleet acquisition plan approval. Must include the *item number* from the fleet acquisition plan spreadsheet.
- FAMS Updated**  
All fleet assets must be entered into FAMS. Updates to inventory and monthly usage and fuel data must be submitted by the 15<sup>th</sup> of each month.

#### AS NEEDED

- Property Transfer Report, STD. 158**  
Complete if reutilizing an existing asset from another state agency.
- Fire Truck Questionnaire**  
Complete supplemental questions if requesting to purchase additional fire engines.