

SAM—TRANSPORTATION SERVICES

CHAPTER 4100 INDEX

This chapter discusses the operational policies of all aspects of transportation services. This includes state-owned or operated mobile equipment, commercial vehicle rentals, airline transportation, parking and commuter services.

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SAM—TRANSPORTATION SERVICES

INTRODUCTION (Revised 01/2016)

4100

The Department of General Services, Office of Fleet Administration Management (OFAM) is responsible for establishing, implementing, and maintaining policies and procedures governing state-owned mobile equipment. Mobile equipment is defined as equipment that is self-powered, easily moved and used for passenger, and equipment transportation and construction or maintenance work.

SAM—TRANSPORTATION SERVICES

MAINTENANCE

4101

(Renumbered from 4150 and Revised 6/96)

It is the responsibility of agencies/departments to insure compliance with minimum preventive maintenance standards for state-owned mobile equipment. This includes, but is not limited to, prescribed lubrication service and mechanical inspection on a mileage or time basis. Requirements are listed in the Automobile Maintenance Record form, [STD. 271](#). Equivalent records may be substituted with the approval of the OFA. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

NO SMOKING IN STATE VEHICLES

4102

(New 6/96)

Smoking is prohibited in all state-owned passenger mobile equipment which include light and heavy duty trucks, cargo and passenger vans, buses, and any other mobile equipment with an enclosed driver/passenger compartment. See California Vehicle Code Section [465](#) and Government Code Section [19994.30](#).

SAM—TRANSPORTATION SERVICES

MODIFICATIONS

4103

(Renumbered from 4160 and Revised 6/96)

Any modification to original factory equipped mobile equipment requires prior approval from the OFA. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

IDENTIFICATION

4104

(Renumbered from 4120 and Revised 6/96)

State-owned mobile equipment used on public roads shall be properly identified. The Director of DGS shall approve the type of identification used.

Exceptions are state-owned mobile equipment used by elected officials with regular automobile license plates; mobile equipment designated as exempt by the Director of DGS; and undercover vehicles as authorized in the California Vehicle Code. See Vehicle Code Section [5001](#) and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

UTILIZATION

4105

(Renumbered from 4130 and Revised 6/96)

It is the responsibility of Agency Secretaries and/or department directors to insure the proper use of state-owned mobile equipment. See Government Code Section [19993.2](#) and Department of Personnel Administration (DPA) Section 599.800.

SAM—TRANSPORTATION SERVICES

PASSENGER MOBILE EQUIPMENT USAGE REPORT

4106

(Renumbered from 4131 and Revised 06/96)

In order to insure optimum utilization of state-owned passenger mobile equipment (see Vehicle Code Section [465](#)), a Passenger Vehicle Usage Certification form, [STD. 276A](#), will be submitted to the OFA bi-annually, February 15 and August 15. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

TRAVEL LOGS

4107

(Renumbered from 4143 and Revised 6/96)

Agencies/departments will maintain a Monthly Travel Log form, [STD. 273](#), on all state-owned passenger mobile equipment except for motorcycles, trucks over 3/4 ton, and heavy equipment. See DPA Section 599.807 and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

FUEL CARD MANAGEMENT

4108

(Renumbered from 4151 and Revised 6/96)

It is the responsibility of agencies/departments to review gasoline credit card charges and monthly billing statements in order to reduce unnecessary and improper charges. Agencies/departments shall pursue recovery of unauthorized charges.

SAM—TRANSPORTATION SERVICES

GENERAL SERVICES CHARGE CARD

4108.1

(New 10/06)

It is the responsibility of agencies/departments to execute proper management and oversight of General Services Charge Cards under their jurisdiction and shall:

- Report the loss, theft or discontinuance of all General Services Charge Cards, in writing, to the [OFA](#).
- Establish and implement internal procedures to ensure accountability of charge cards.
- Present the General Services Charge Card and obtain a receipt from commercial car rentals and taxi services.
- Provide oversight and guidelines to ensure cards are properly safeguarded, assigned, and used for official state business only.
- Establish and implement procedures that provide for the performance of periodic inventory and reconciliation activities with reporting to OFA.

SAM—TRANSPORTATION SERVICES

HOME STORAGE

4109

(Renumbered from 4144 and Revised 6/96)

Storage of state-owned mobile equipment at an employee's residence on a regular basis requires an approved Vehicle Home Storage Request/Permit form, [STD. 377](#), be on file with the employee's department. Annual renewal of STD. 377 is required. See DPA Section 599.808 and OFA State Fleet Handbook.

SAM—TRANSPORTATION SERVICES

MOBILE EQUIPMENT PURCHASES

4110

(Renumbered from 4111 and Revised 6/96)

A Purchase Order form, [STD. 65](#), or Purchase Estimate form, [STD. 66](#), will be submitted directly to OFA for the purchase of additional or replacement mobile equipment. A justification for additional mobile equipment or an approved Property Survey Report form, [STD. 152](#), for replacement mobile equipment will be attached to the purchase document.

A current Passenger Vehicle Usage Certification form, [STD 276A](#), must be on file with OFA prior to the approval of STD. 65 or STD. 66. See SAM Section 4106, Government Code Section [13332.09](#), and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

DISPOSITION

4111

(Renumbered from 4172 and Revised 6/96)

Disposal of mobile equipment shall be by public auction or sealed bid. The method of disposal is subject to approval by OFA. See Government Code Section [13332.09](#) and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

REUTILIZATION OR TRANSFER

4112

(Renumbered from 4173 and Revised 6/96)

Mobile equipment no longer needed by an agency/department shall be made available to other state agencies/departments or government entities. Requests for reutilization or transfer of state-owned mobile equipment shall be submitted to OFA. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

INSPECTION SERVICES

4113

(Renumbered from 4181 and Revised 6/96)

Inspection services are provided to agencies/departments participating in the Inspection Services Program. Services are provided upon request or can be initiated by OFA. Services include new and used mobile equipment inspection and assistance with the purchase, repair, replacement, and disposition of state-owned mobile equipment. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

ANNUAL INVENTORY OF MOBILE EQUIPMENT

4114

(Renumbered from 4102 and Revised 6/96)

The Annual Inventory of Mobile Equipment form, OFA 53, is required for the self-insurance and Inspection Services Program cost allocation. Agencies/departments will submit OFA 53 to OFA by July 10. See [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

REPAIRS AT COMMERCIAL/STATE FACILITIES

4115

(Renumbered from 4161, 4162 and 4166, and Revised 6/96)

Repairs to state-owned mobile equipment, including replacement of auto glass, at a commercial/state facility exceeding the delegated amount require prior approval from an OFA Inspector of Automotive Equipment (IAE). See OFA [State Fleet Handbook](#) and Vehicle Glass Replacement Price Schedule.

SAM—TRANSPORTATION SERVICES

ACCIDENT REPAIRS

4116

(Renumbered from 4163 and New 6/96)

Agencies/departments are to obtain a minimum of three (3) bid estimates for accident repairs to all state-owned mobile equipment exceeding the delegated amount. Review and approval of the bid estimates by an OFA IAE are required. See SAM Section [3600](#) and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

STATEWIDE TRAVEL PROGRAM (Revised 01/2016)

4117

The Statewide Travel Program (STP) administers the travel contracts for airfare, commercial car rentals, travel management services (travel agency), and the travel payment system.

Agencies/departments must make all travel arrangements (airfare, hotel, commercial car rental and rail), with the exception of short-term rentals (defined below), through the STP. Comprehensive travel services are offered via the state's authorized online self-booking tool which is the primary means for booking travel, and/or call-in service through the state's contracted travel agency.

Short-term Rentals

Per Government Code section 19822.4 (Chapter 770, Statutes of 2015 [AB 229]), state employees may utilize lodging reserved through a short-term rental service (such as Airbnb), in lieu of the STP, when traveling on official state business. Short-term rentals are defined in AB 229 as "residential property that is rented to a visitor for fewer than 30 days through a centralized online platform whereby the rental is advertised and payments for the rental are securely processed." Reservations for short-term rentals may be made through the service's proprietary centralized online platform (such as airbnb.com).

When determining the mode of transportation, travelers shall use the most economical means of transportation; i.e., taxi, rail, bus, air, state, commercial or privately-owned vehicle.

The Statewide Travel Program website may be accessed at www.dgs.ca.gov/travel. For reference, see DGS Management Memo #14-03.

SAM—TRANSPORTATION SERVICES

AIRLINES (New 6/96)

4117.1

State employees are required to obtain service from the contract airline(s) when traveling between specific city-pairs. Exceptions are: (1) space on a scheduled flight is not available to accomplish the purpose of the travel, or available service would require overnight lodging; or (2) a non-contract carrier offers a lower fare available to the general public, the use of which will result in a lower total trip cost to the state. (THIS EXCEPTION DOES NOT APPLY IF THE CONTRACT CARRIER OFFERS A COMPARABLE FARE AND HAS SEATS AVAILABLE AT THAT FARE, OR IF THE LOWER FARE OFFERED BY A NON-CONTRACT CARRIER IS RESTRICTED TO STATE TRAVELERS ON OFFICIAL GOVERNMENT BUSINESS ONLY.)

SAM—TRANSPORTATION SERVICES

CAR RENTALS (Revised 01/2016)

4117.2

The Department of General Services (DGS), Office of Fleet and Asset Management (OFAM) operates a daily car rental service out of the Sacramento State Fleet Garage, located at 1416 10th Street, Sacramento, CA. OFAM has also established and manages a commercial car rental contract with a nationwide car rental provider.

State employees in need of short-term vehicle transportation may use either the OFAM daily vehicle rental services or the state's contracted commercial car rental company when conducting official state business. State employees may use either of these services; however, as instructed in [SAM Section 4117](#), state employees shall choose the service which is most economical and meets their operational needs.

As outlined in [Management Memo 13-01](#), vehicles rented or leased for over 30 consecutive calendar days or more than (4) consecutive work weeks (excluding weekends and holidays) are required to be approved through a department's Fleet Acquisition Plan (FAP) prior to renting or leasing the vehicle. Continually re-renting fleet assets week to week or with a short break after 30 days without seeking OFAM approval is prohibited.

Vehicles equipped for persons with disabilities are available at both the Sacramento State Fleet Garage or from the contracted commercial car rental company.

SAM—TRANSPORTATION SERVICES

TRAVEL AGENCIES

4117.3

(New 6/96)

Agencies/departments may select any travel agency (ies) that meet their travel needs from a list of authorized travel agencies. Each state agency/department shall determine its own appropriate system for managing airline ticket purchases and communicate this system to its employees and the authorized travel agency (ies).

SAM—TRANSPORTATION SERVICES

TRAVEL PAYMENT SYSTEM

4117.4

(Revised 9/09)

The OFA administers the contract to provide the state's travel payment system and management reports. It is the responsibility of each state agency/department to determine its own appropriate system for managing travel.

Questions regarding current contracts and/or Statewide Travel Program may be directed to OFA, Travel Program Coordinators at (916) 376-3988. Also visit the Statewide Travel Program "Travel Portal" website at <http://www.dgs.ca.gov/travel/Home.aspx>

SAM—TRANSPORTATION SERVICES

PARKING AND COMMUTE SERVICES

4118

(Renumbered from 4188–4188.06 and Revised 6/96)

The OFA maintains parking facilities, provides parking in major urban areas to state employees and the public, and provides commute service information to state employees in coordination with the Department of Transportation. See Government Code Sections [14678–14679.5](#), and [19993.1](#) and [OFA State Fleet Handbook](#).

SAM—TRANSPORTATION SERVICES

ACQUISITION OF VEHICLES

4120

(New 2/2016)

Overview

Purchase of State vehicles will be made by consolidation of agency annual requirements in order to affect savings by volume buying. See Government Code Section 14615 and Public Contract Code Section 10308. In addition, Government Code Section 13332.09 provides that:

"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 therefor. 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 need therefor."

The Department of General Service, Office of Fleet and Asset Management (OFAM) are eliminating the use of the Vehicle Acquisition Request Form (OFA 160); state departments will no longer submit individual fleet acquisition request to OFAM. This policy applies to all emergency and non-emergency vehicles and mobile equipment, henceforth referred to as fleet assets.

Beginning in Fiscal Year (FY) 2012-13, state departments are required to submit an electronic *Fleet Acquisition Plan (FAP)* to OFAM each fiscal year for all new and/or all existing asset replacement needs that have not been previously approved by OFAM. The plan should include any long-term rentals or leases of fleet assets. The FAP contains the documents listed below which must all be included to be considered a complete (FAP). An electronic copy of the FAP documents below can be found at the DGS website located at [http://www.dgs.ca.gov/ofam/Programs/FARS/Vehicle Acq.aspx](http://www.dgs.ca.gov/ofam/Programs/FARS/Vehicle%20Acq.aspx):

1. Fleet Acquisition Plan Narrative
2. Fleet Acquisition Plan Spreadsheet
3. Fleet Acquisition Certification
4. Other Supporting Documents, as applicable
5. Fire Truck Questionnaire (Addendum A), as applicable

Fleet Acquisition Plan Narrative

OFAM has created a written narrative format that must be followed. It outlines vital areas that are necessary in order to ensure that the planned acquisitions comply with existing policy and other requirements.

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SAM—TRANSPORTATION SERVICES

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ACQUISITION OF VEHICLES

4120 (Cont. 1)

(New 2/2016)

Fleet Acquisition Plan Spreadsheet

The Excel spreadsheet created by OFAM includes the line item detail of each planned new or replacement asset including justification for the need to add or replace an asset. Fleet replacement requests will be analyzed by applying utilization metrics to vehicle utilization data retrieved from the Fleet Asset Management System.

Fleet Acquisition Certification

This certification is required by Public Contract Code Section 10295.2(a) and Executive Order (EO) B-2-11. The certification must be signed by department Director (no designee signature will be accepted) and, where applicable, Agency Secretary or authorized designee. The certification shall include the date, title and signature of the person(s) authorizing the acquisition. The Director of DGS must approve all such purchases, subject to review by the Secretary of Government Operations Agency.

Other Supporting Documents

Departments should include with their request other documentation if it helps justify the acquisition. For example, if additional fleet assets are being requested that increase the size of the department's fleet baseline, supporting documentation must be provided to substantiate the request for additional fleet assets. Such documentation may include, but is not limited to, a copy of an authorized budget change proposal, a Governor's budget line item, or other documentation supporting an increase in staffing or workload corresponding with the need for additional fleet assets.

Fire Truck Questionnaire (as applicable)

This questionnaire requests additional supporting information and is required for the purchase of fire engines.

Due Dates:

Electronic copies of the FAP and all required applicable documents must be submitted to OFAM (email to FARSInfo@dgs.ca.gov) on or after the first day of the fiscal year (July 1st) for which the FAP is being submitted and no later than:

- First business day of February for one-time-buy acquisitions (*Purchase Estimate Form STD. 66 and STD. 66A*);
- First business day of April for master vehicle contract acquisitions, donations, and long-term rental/lease acquisitions.

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SAM—TRANSPORTATION SERVICES

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ACQUISITION OF VEHICLES

4120 (Cont. 2)

(New 2/2016)

Addendums to FAPs due to extraordinary circumstances (see *Addendum to Fleet Acquisition Plan* section below) will be accepted if the addendum is submitted to OFAM at least 45 working days prior to the end of a fiscal year and the applicable manufacturer's cut-off dates.

Please note: All purchase estimates must be approved (stamped) by OFAM and submitted to DGS Procurement Division prior to **April 1st**. It is highly recommended that departments that intend to purchase assets with a *Purchase Estimate Form* (STD. 66 and STD. 66A) submit a FAP early in the fiscal year (prior to the February 1st deadline) to help ensure that DGS Procurement Division will be able to process requests in the same fiscal year. For a complete list of relevant fleet acquisition due dates, please see SAM Section 4127, *Key Due Dates and Timeframes*.

SAM—TRANSPORTATION SERVICES

FLEET ASSET REPORTING

4120.1

(New 2/2016)

State departments are required to comply with fleet reporting requirements pursuant to Public Resource Code Section 25722.5. Executive Order B-2-11 requires state departments to update their fleet asset information on a monthly basis, including fuel and utilization data. The fleet data is necessary for OFAM to complete and submit various reports mandated by the legislature and the federal government. Additionally, OFAM uses the fleet data entered into FAMS to conduct analysis on fleet asset requests. Consequently, beginning with FAPs submitted in FY 2015/16 and thereafter, OFAM will not process a department's FAP if the department is not in compliance with required reporting for fleet asset with odometers. Please note reporting requirements apply to all fleet assets both with and without odometers. (An electronic copy of the *list of Required Fields for Vehicles and Equipment required to be entered into FAMS* can be found at the DGS website located at http://www.dgs.ca.gov/ofam/Programs/FARS/Vehicle_Acq.aspx.)

SAM—TRANSPORTATION SERVICES

**PURCHASE ORDER STD. 65, 65A AND
PURCHASE ESTIMATE STD. 66, 66A**
(New 2/2016)

4120.2

Upon approval by OFAM of a department's FAP, the department may begin the purchasing process to acquire one or more of their approved fleet assets by submitting the appropriate purchasing documentation to OFAM. A department shall submit the *Purchasing Authority Purchase Order Form (STD. 65 and STD. 65A)* and *Purchase Estimate Form (STD. 66 and STD. 66A)* as applicable with a copy of the STD. 152 and *Equipment Inspection Form (OFA 6)*, if applicable, to OFAM for the final "stamp of approval."

SAM—TRANSPORTATION SERVICES

FLEET ASSET APPROVAL EXPIRATION

4120.3

(New 2/2016)

The FAP, including any approved addendums, is valid for the fiscal year in which the plan was approved plus one additional fiscal year. Approved assets on a FAP requiring a STD. 66 and STD. 66A shall remain in effect for the fiscal year in which the plan was approved plus two additional years. Upon the expiration of an approved FAP *for which approved assets were not purchased*, departments are required to re-justify the need to acquire these asset(s) through submission of a new FAP and required documents.

SAM—TRANSPORTATION SERVICES

ADDENDUMS

4120.4

(New 2/2016)

OFAM will accept addendums to an approved FAP from a department should fleet needs change during the course of the fiscal year due to extraordinary circumstances for which the department demonstrates an immediate need for the fleet assets. An example of an extraordinary circumstance would be an unexpected loss of a piece of equipment resulting in a need to purchase replacement equipment or to lease/rent equipment for more than 30 days. An addendum to a FAP must include all documents listed above, as applicable, and comply with fleet data reporting requirements in order to be processed.

SAM—TRANSPORTATION SERVICES

LEASES/RENTALS

4120.5

(New 2/2016)

Vehicles rented or leased for over 30 consecutive calendar days or more than (4) consecutive work weeks (excluding weekends and holidays) are required to be approved through a department's FAP prior to renting or leasing the vehicle. Continually re-renting fleet assets week to week or with a short break after 30 days without seeking OFAM approval is prohibited.

SAM—TRANSPORTATION SERVICES

TEMPORARY LEASES OF PASSENGER VEHICLES

4120.6

(New 2/2016)

If a department incurs significant damage to or loss of an owned passenger vehicle, DGS may provide a temporary DGS vehicle under specific circumstances. These circumstances occur when the deadline to submit an acquisition request has passed and/or there are no state contracts for that vehicle type needed in effect. In these circumstances, the department can request approval from OFAM to temporarily lease a passenger vehicle until a new FAP can be submitted and the replacement vehicle is received. These temporary requests shall be in writing but do not require a department to submit or amend an existing FAP or provide the supporting documents. These requests will be considered by OFAM on a case-by-case basis and are subject to the availability of vehicles. A department will be required to include this leased DGS vehicle on its next FAP if this vehicle needs to be replaced. If a department should need to lease/rent a vehicle for less than 30 days, a department may use the state's commercial rental contract without OFAM approval.

SAM—TRANSPORTATION SERVICES

SUBSTITUTIONS

4120.7

(New 2/2016)

In an effort to streamline the process, OFAM is establishing a substitution process to address a demonstrated, immediate business need to substitute an approved replacement asset and/or approved asset purchase. The substitution process shall only be used in limited circumstances. The substitution process shall not be used to circumvent the Fleet Acquisition Plan Addendum process.

In specific circumstances, a substitution for an approved replacement asset or approved asset purchase may be necessary. These circumstances include, and are limited to: a vehicle that is inoperable, not cost effective to repair, and/or stolen, and the department has a demonstrated immediate need to replace that fleet asset with one that was already approved on a FAP.

In limited circumstances a department may also substitute an approved fleet asset purchase for another type of fleet asset. Such substitution shall only occur when there is a demonstrated immediate need for the vehicle to be purchased and the needed vehicle is no longer available on the state contract, and/or if the fleet asset no longer meets the department's business needs due to changes in program's business needs for which the asset would be used (*i.e., fleet assets tied to an emergency Executive Order, Declaration and/or legislation*). Substitutions may only be performed on approved, current FAPs that have not expired. Substitution requests must be submitted on the *Fleet Acquisition Substitution Form* and include all required information (OFA 6, if applicable), justification, and signature by the department's director. The substitution request must meet the required justification criteria and compliance with the Energy Policy Act (EPA), Miles per Gallon (MPG) standard, and Executive Order B-16-12. The substitution request shall be approved by the Chief of OFAM. (An electronic copy of the *Fleet Acquisition Substitution Form* can be found at the DGS website located at [http://www.dgs.ca.gov/ofam/Programs/FARS/Vehicle Acq.aspx](http://www.dgs.ca.gov/ofam/Programs/FARS/Vehicle%20Acq.aspx).)

SAM—TRANSPORTATION SERVICES

EXECUTIVE ORDER B-16-12 ZERO EMISSION PURCHASING MANDATE

4121

(Revised 12/2016)

Pursuant to Executive Order (EO) B-16-12 state agencies are required to increase the number of zero emission vehicles (ZEV) within the state fleet through the normal course of fleet replacement so that at least 10 percent of fleet purchases of light-duty (LD) vehicles are ZEV by 2015 and 25 percent by 2020. In accordance with the Governor’s 2016 ZEV Action Plan, beginning in Fiscal Year (FY) 2017/2018, state agencies will be required to increase upon EO B-16-12’s 10 percent ZEV purchasing requirement by 5 percent each year through FY 2024/2025. As EO B-16-12 presently directs each state agency to ensure that at least 10% of its annual LD fleet purchases be a ZEV, a state agency will now be required to increase its annual LD ZEV purchasing as follows:

Fiscal Year	EO B-16-12 ZEV Purchasing Requirements (CURRENT)	EO B-16-12 ZEV Purchasing Requirements (NEW)
2014/2015	10%	10%
2015/2016	10%	10%
2016/2017	10%	10%
2017/2018	10%	15%
2018/2019	10%	20%
2019/2020	25%	25%
2020/2021	25%	30%
2021/2022	25%	35%
2022/2023	25%	40%
2023/2024	25%	45%
2024/2025	25%	50%

ZEVs include pure zero emission vehicles such as hydrogen fuel cell vehicles (FCVs) and battery electric vehicles (BEV). Plug-in hybrid electric vehicles (PHEVs) are considered transitional ZEVs and may be partially considered toward the ZEV requirement. Additionally, medium duty (MD) and heavy duty (HD) ZEV and PHEV purchases may also be considered for the fulfillment of the LD ZEV requirement. However, consideration towards the LD ZEV requirement will be based on their certified electric driving range established by the California Air Resources Board (CARB). See SAM Section 4121.3 “ZEV Credits and Credit Ratios”, for credit information and ranges.

To meet the expanded ZEV purchasing targets, beginning in FY 2017/2018 state agencies are required to purchase ZEVs (including Battery Electric, Fuel Cell, and Plug-In Hybrid) and Hybrid-Electric Alternative Fuel Vehicles (Hybrid AFVs), in designated light-duty vehicle categories, in lieu of light-duty vehicles that are powered solely by internal combustion engines utilizing fossil fuels and flex-fuel vehicles or bi-fuel vehicles powered by petroleum based fuels. See SAM Section 4121.1, “ZEV & Hybrid First Purchasing Mandate” for more details.

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EXECUTIVE ORDER B-16-12 ZERO EMISSION PURCHASING MANDATE

4121 (Cont.1)

(Revised 12/2016)

When submitting a FAP, agencies must demonstrate they have sufficient ZEV charging/fueling infrastructure to support their current and future ZEV purchases. See SAM Section 4121.6, “ZEV Infrastructure Readiness” for information necessary to sufficiently demonstrate proper ZEV charging/fueling infrastructure.

At least half (50 percent) of the vehicles required to comply with the ZEV purchasing mandate must be pure ZEVs, unless an agency meets the exemption criteria listed in SAM Section 4121.2 “50 Percent Pure ZEV Purchasing Exemption”.

LD vehicles having special performance requirements necessary for the protection of public safety and welfare are exempted from these mandates. See the SAM Section 4121.4 “EO B-16-12 Public Safety Special Performance Exemption” for details.

All FAPs that do not meet these new purchasing requirements will not be processed.

SAM—TRANSPORTATION SERVICES

ZEV & HYBRID FIRST PURCHASING MANDATE

4121.1

(New 12/2016)

ZEV & Hybrid-Electric Alternative Fuel Vehicle First Purchasing Mandate

Beginning in fiscal year (FY) 2017/2018, state agencies are required to prioritize purchasing of ZEVs (including Battery Electric, Fuel Cell, and Plug-In Hybrid) and Hybrid-Electric Alternative Fuel Vehicles (Hybrid AFVs), in designated light-duty vehicle categories where programmatically feasible. These purchases shall be prioritized over light-duty vehicles that are powered solely by internal combustion engines utilizing fossil fuels and flex-fuel vehicles or bi-fuel vehicles powered by petroleum based fuels and other alternative fuels, such as ethanol. Designated light-duty vehicle categories subject to this policy are listed on the Department of General Services (DGS), Office of Fleet and Asset Management's (OFAM) website (www.dgs.ca.gov/ofam/). The ZEV/Hybrid First purchasing requirement exists in addition to a department's annual, light-duty ZEV purchasing requirements.

When submitting a fleet acquisition plan (FAP) to DGS for the acquisition of additional or replacement vehicles, as mandated in SAM Section 4120, state agencies shall select vehicles in light-duty categories subject to this policy based on the following priority structure:

- Priority 1: Pure ZEVs (Battery Electric & Fuel Cell Vehicles)
- Priority 2: Plug-in Hybrid ZEVs
- Priority 3: Hybrid-Electric Alternative Fuel Vehicles
- Priority 4: Internal Combustion and Bi/Flex-Fuel Vehicles

If requesting a vehicle subject to this policy in a Priority level other than Pure ZEV, agencies must be able to sufficiently demonstrate and justify why their programmatic transportation requirements could not be satisfied with a vehicle from each higher Priority level. Each requested drop in Priority level must be fully justified in accordance with criteria outlined in the "ZEV & Hybrid Priority Level Exemptions" section below.

This requirement does not apply to requests for vehicles with special performance requirements necessary for the protection of public safety and welfare.

ZEV & Hybrid Priority Level Exemptions

Agencies requesting exemptions from ZEV and Hybrid AFV Priority levels must submit justifications and/or certifications, in accordance with the guidelines below, with the agency's Fleet Acquisition Plan (FAP) for each vehicle being exempted. To be approved for exemption from a Priority level, vehicles must meet one of the exemption criteria listed for that Priority level and agencies must provide the certification and/or justification required for that specific exemption.

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ZEV & HYBRID FIRST PURCHASING MANDATE

4121.1 (Cont.1)

(New 12/2016)

Priority 1: Pure ZEVs (Battery Electric & Fuel Cell Vehicles)

Exemptions

- Range Limitations: vehicle requested is used more than 72 times in a 12-month period, or 36 times in a 3-month period, for trips lasting less than 24 hours that exceed the mileage range of the Pure ZEV on contract in that vehicle category, or;
- Charging/Fueling Availability: vehicle requested is used more than 72 times in a 12-month period, or 36 times in a 3-month period, for trips lasting more than 24 hours in locations with limited and/or unreliable fueling/charging stations, or;
- Cargo/Passenger Capacity: vehicle requested has a demonstrated need for cargo/passenger capacity that exceeds the capacity available in the Pure ZEV on contract in that vehicle category.

Required Certifications/Justifications

- Range Limitations
 - Directorate level certification, to be included on the FAP Certification, that the vehicle(s) being requested will be used more than 72 times in a 12-month period, or 36 times in a 3-month period, for trips lasting less than 24 hours that exceed the mileage range of the Pure ZEV on contract in that vehicle category, or;
- Charging/Fueling Availability
 - Directorate level certification, to be included on the FAP Certification, that the vehicle(s) being requested will be used more than 72 times in a 12-month period, or 36 times in a 3-month period, for trips lasting more than 24 hours in locations with limited and/or unreliable fueling/charging stations, or;
- Cargo/Passenger Capacity
 - Narrative justification demonstrating why the cargo/passenger capacity of a Pure ZEV on contract would not meet the agency's operational needs. Justification must be comprehensive and should include the following:
 - Narrative describing the vehicle's operational function and what about that function requires an increased cargo/passenger capacity, and;
 - Detailed interior space or trunk space requirements, including the number of people being transported and/or a detailed listing of the items being transported that require increased space.

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(Continued)

ZEV & HYBRID FIRST PURCHASING MANDATE

4121.1 (Cont.2)

(New 12/2016)

Priority 2: Plug-in Hybrid ZEVs

Exemptions

- **Cargo/Passenger Capacity:** vehicle requested has a demonstrated need for cargo/passenger capacity that exceeds the capacity available in the Plug-in Hybrid ZEV on contract in that vehicle category.

Required Certifications/Justifications

- **Cargo/Passenger Capacity**
 - Narrative justification demonstrating why the cargo/passenger capacity of a Plug-in Hybrid on contract would not meet the agency's operational needs. Justification must be comprehensive and should include the following:
 - Narrative describing the vehicle's operational function and what about that function requires an increased cargo/passenger capacity, and;
 - Detailed interior space or trunk space requirements, including the number of people being transported and/or a detailed listing of the items being transported that require increased space.

Priority 3: Hybrid-Electric Alternative Fuel Vehicles

Exemptions

- **Environmental Impact:** vehicle requested has a higher U.S. Environmental Protection Agency (EPA) Fuel Economy and Greenhouse Gas Emissions score (1 through 10 scale, with 10 being the best) than the contracted hybrid in that vehicle category.

Required Certifications/Justifications

- **Comparison of the Environmental Protection Agency's (EPA) Fuel Economy and Greenhouse Gas Emissions score for the requested vehicle to the EPA score of the comparable Hybrid-Electric AFV on statewide contract.** EPA Fuel Economy and Greenhouse Gas Emissions scores can be found by:
 - Use the "Find a Car" feature on <http://www.fueleconomy.gov> to look up the vehicle for which you would like the score.
 - Once at the vehicle's information page, click on the "Energy and Environment" tab to find the Greenhouse Gas Emissions score.

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50 PERCENT PURE ZEV PURCHASING EXEMPTION

4121.2

(New 12/2016)

Beginning in FY 16/17, agencies that have integrated Zero Emission Vehicle (ZEV) compatible telematics solutions into 100 percent of their ZEV fleet and commit to providing DGS with monthly reporting demonstrating proper charging/fueling of these ZEVs shall be exempt from the 50 percent pure ZEV purchasing requirement. Charging/fueling information captured by the telematics solution shall be uploaded monthly, in accordance with Executive Order (EO) B-2-11 and Public Resource Code Section 25722.5, into the Fleet Asset Management System (FAMS). The Department of General Services (DGS), Office of Fleet and Asset Management (OFAM) will monitor charging/fueling data to ensure proper use of ZEV assets.

ZEVs include plug-in electric vehicle such as Battery Electric Vehicles (BEV) and plug-in hybrid electric vehicles (PHEV) as well as Fuel Cell Vehicles (FCV). An ZEV capable vehicle telematics solution must be able to accurately report electricity, petroleum (as applicable), and hydrogen fuel usage, as well as other vehicle reporting data such as odometer information and days used on a monthly basis.

A telematics solution is a system that is installed in a vehicle that records and transmits information about the vehicle such as the current odometer, maintenance needs, and fuel consumption.

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ZEV CREDITS AND CREDIT RATIOS

4121.3

(New 12/2016)

Zero Emission Vehicle (ZEV) Credits

ZEV credits may be used toward the applicable yearly mandatory ZEV acquisition requirements. ZEV credits may be acquired for ZEV purchases approved prior to July 1, 2017 that exceeds the amount required for a fiscal year. Effective July 1, 2017 agencies will no longer acquire ZEV credits for purchases that exceed the amount required for a fiscal year. However, agencies may still use ZEV credits acquired prior to July 1, 2017 to meet applicable ZEV acquisition requirements in subsequent years. Please note, while BEV credits may be used towards all ZEV requirements, plug-in hybrid vehicle (PHEV) credits can only be used to meet compliance for PHEVs after the 50 percent battery electric vehicle (BEV) requirement has been met.

ZEV Credit Ratios

Light Duty (LD) and Heavy Duty (HD) ZEV and PHEV Ratio Table

Vehicle Type	Minimum Range	Maximum Range	Ratio ¹
BEV			1:1
Low Range PHEV	10	19	5:1
Mid Range PHEV	20	34	3:1
Long Range PHEV	35	49	2:1
Extra Long Range PHEV	50	n/a	1:1

Medium Duty (MD) and Heavy Duty (HD) ZEV and PHEV Ratio Table

Vehicle Type	Minimum Range	Maximum Range	Ratio ³
MD ZEV ¹	-	-	1:1.5
HD ZEV ²	-	-	1:3
MD ZEV ¹	100	-	1:1
HD ZEV ²	100	-	1:2
MD ZEV ¹	50	<100	2:1
HD ZEV ²	50	<100	1:1
MD ZEV ¹	30	<50	3:1
HD ZEV ²	30	<50	1.5:1
HD Bucket Truck (conventional ICE) with Electric Power Takeoff (ePTO)	-	-	12:1

¹ Includes Class 2B-3 GVWR 8,501 to 14,000 lbs.

² Includes Class 4-8, GVWR > 14,000 lbs.

³ For example, a 1:3 ratio means each corresponding Class 4-8 HD ZEV is equivalent to 3 LD ZEVs.

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EO B-16-12 PUBLIC SAFETY SPECIAL PERFORMANCE EXEMPTION

4121.4

(Revised 12/2016)

EO B-16-12 specifies that only public safety vehicles with special performance requirements are exempted from a state agency's annual zero emission vehicle (ZEV) purchasing requirements. Governor Brown's 2016 ZEV Action Plan requires the Department of General Services (DGS) to evaluate and provide further guidance to agencies as to the appropriate circumstances under which the public safety exemption should be invoked so as to ensure that ZEVs are integrated in to public safety mobile assets wherever feasible.

Accordingly, when evaluating the invocation of this exemption for a specific light-duty vehicle within its fleet, a state agency must be able to demonstrate that:

- 1) The vehicle is an authorized emergency vehicle pursuant to California Vehicle Code §1665; and,
- 2) The vehicle, pursuant to California Vehicle Code §21055, may be
 - a. driven in response to an emergency call or while engaged in rescue operations, or
 - b. driven in immediate pursuit of an actual or suspected violator of the law,
 - c. driven in response to, but not returning from, a fire alarm, or
 - d. operated from one place to another as rendered desirable or necessary by reason of an emergency call and operated to the scene of the emergency, or
 - e. operated from one fire station to another or to some other location by reason of the emergency call; and,
- 3) The vehicle must be able to reach the anticipated emergency location within 30 minutes to no more than 1 hour.
- 4) Where emergency response is not the primary purpose of a vehicle, a state agency must be able to demonstrate that the specific vehicle may be used as part of an established mutual aid agreement that would necessitate an emergency response as outlined above.

Agencies shall submit a public safety special performance exemption justification either through the EO B-16-12 Public Safety Special Performance Exemption Request form located on the DGS website or include the agency justification in the Fleet Acquisition Plan Spreadsheet. Agencies are expected to evaluate their entire light-duty fleet for every opportunity to incorporate ZEVs over traditional vehicles. (An electronic copy of the *EO B-16-12 Public Safety Special Performance Exemption Request Form* can be found at the DGS website located at <http://www.dgs.ca.gov/ofam/forms.aspx>)

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ZEV PURCHASE ORDERS & ABBREVIATED ZEV ACQUISITION PROCESS

4121.5

(New 12/2016)

ZEV Purchase Orders

To ensure approved ZEVs are purchased and agencies comply with applicable annual ZEV purchasing requirements, purchase orders for ZEVs must be issued within the same fiscal year or three months after receiving a FAP approval, whichever is later.

Abbreviated ZEV Acquisition Process

To expedite the purchase of ZEVs OFAM has established an abbreviated FAP process for ZEV requests that can be submitted separate from an agency's full FAP. To use the expedited ZEV process agencies will need to submit a completed *Fleet Acquisition Plan Spreadsheet* listing all the ZEVs being requested to be purchased. In addition agencies will need to provide a completed and signed *Fleet Acquisition Certification* for the ZEV vehicles. Expedited ZEV requests shall include the same level of justification for additional vehicles and meet the disposition criteria for vehicle replacements. ZEV requests processed under this method will be approved by the Chief of OFAM. ZEV purchases approved through this process will be reconciled with the agency's full FAP to ensure overall compliance.

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ZEV INFRASTRUCTURE READINESS

4121.6

(New 12/2016)

When submitting a Fleet Acquisition Plan (FAP) to the Department of General Services (DGS), Office of Fleet and Asset Management (OFAM), state agencies must be able to demonstrate sufficient zero emission vehicle (ZEV) charging infrastructure (to support an agency's existing and requested ZEV's) in order to receive approval.

To demonstrate sufficient ZEV charging infrastructure, agencies must submit answers to the following applicable questions with their FAP. Please see the Fleet Acquisition Plan Narrative Instructions form for more details.

1. What is the address of the location where this vehicle will be domiciled at (please provide this address on the FAP spreadsheet in the column titled "ZEV Domicile Address")?
2. How many electric vehicle (EV) chargers (broken down by charger type) are currently installed at the vehicle's anticipated domicile location?
3. Are the EV chargers single or dual capacity?
4. Does the facility utilize a charging rotation schedule?
5. Are there any other electric charging outlets that could be, or are being, used for EV charging?
6. Are any EV charging stations being currently installed and, if so, when is the anticipated completion date of the installation?
7. How many plug-in electric vehicles are currently domiciled at the anticipated location?
8. For requested Fuel Cell Vehicles, where is the closest Hydrogen Fueling Station?

SAM—TRANSPORTATION SERVICES

DONATIONS AND GIFT OF FLEET ASSETS

4123

(New 2/2016)

Pursuant to Government Code Section 11005 all gifts or dedication of personal property shall be approved by the Director of the Department of Finance (Finance). OFAM request that Finance approval be included with a department FAP that includes donated assets. However, in the event that Finance approval is not obtained prior to submittal of the FAP, OFAM will process the request and recommend a conditional approval until the department is able to obtain Finance approval. OFAM will also notify Finance of the donated assets and conditional approval. Departments shall submit the Finance approval to OFAM once approved.

SAM—TRANSPORTATION SERVICES

VEHICLE INSPECTIONS

4124

(New 2/2016)

All vehicles shall be inspected for acceptance at the delivering dealer's place of business prior to delivery to the purchasing State agency. See SAM Section 4112. This inspection determines that all specifications are met and that the dealer has performed properly the pre-delivery inspection and servicing. The DGS will provide the services of Inspectors of Automotive Equipment to perform the acceptance inspection prior to delivery for all departments in the Inspection Services Program. The owning agency, on receipt of vehicle, should check for any damage incurred in transit from dealer to point of delivery. It is the owning agency's responsibility to license the vehicles and put them in service.

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REPLACEMENT SCHEDULE CRITERIA

4126

(New 2/2016)

To assist agencies with determining replacement schedules and budgeting needs for state-owned vehicles, the following schedule may be used:

Authorized emergency vehicles as defined in Section <u>165</u> of the Vehicle Code, that are equipped with emergency lamps or lights described in Section <u>25252</u> of the Vehicle Code	100,000 miles
Sedans, station wagons, vans and light duty trucks or vehicles having a gross vehicle weight rating (GVWR) or 8500 pounds or less	120,000 miles
Heavy duty trucks or vehicles (Class 3 and under) having a gross vehicle weight rating (GVWR) of 8501 pounds or more	150,000 miles
4-wheel drive vehicles	150,000 miles

The schedule above is to be used as a guideline and not an absolute standard; OFAM may require additional justification for disposing of a vehicle that meets these standards. A state-owned vehicle may be disposed of or replaced when it is determined that it would be cost-effective to do so, regardless of age or mileage. All vehicles being disposed of require a Property Survey Report STD. 152. An OFA 6 shall also be submitted as applicable. An evaluation will be made by an Inspector of Automotive Equipment to determine whether a vehicle should be disposed of or can be safely and economically continued in service and an OFA 6 shall be provided. The decision whether to retain, reutilize, or dispose of any vehicle not meeting the minimum replacement criteria shall be based on an inspection of the following factors:

- Current mechanical condition;
- Previous maintenance and repair record;
- Extent of needed repairs and availability of parts and life expectancy of vehicle after repair;
- Current sale value;
- Cost and availability of replacement unit and accessories;
- Owning agency's ability to replace unit.

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KEY DUE DATES AND TIMEFRAMES

4127

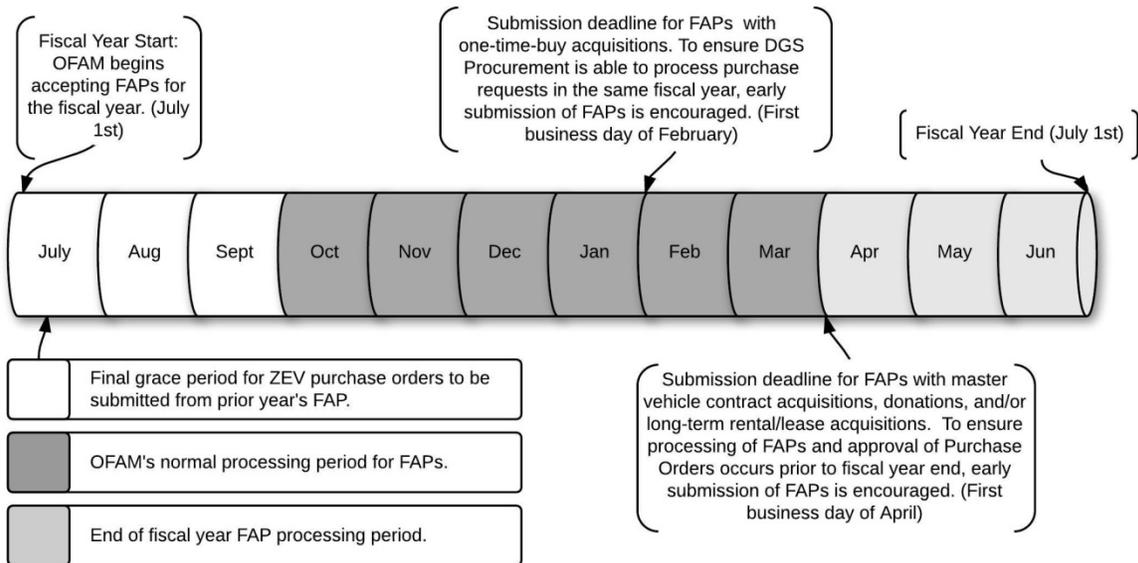
(New 2/2016)

Fleet Acquisition Plan (FAP) Due Dates:

Electronic copies of the FAP [and all required applicable documents, as detailed in State Administrative Manual (SAM) Section 4120] must be submitted to OFAM (email to FARSInfo@dgs.ca.gov) on or after the first day of the fiscal year (July 1st) for which the FAP is being submitted and no later than:

- First business day of February for one-time-buy acquisitions (*Purchase Estimate Form STD. 66 and STD. 66A*);
- First business day of April for master vehicle contract acquisitions, donations, and long-term rental/lease acquisitions.

FAP Due Dates Timeline:



Fleet Asset Approval Expirations:

- The FAP, including any approved addendums, is valid for the fiscal year in which the plan was approved plus one additional fiscal year.
- Approved assets on a FAP requiring a STD. 66 and STD. 66A shall remain in effect for the fiscal year in which the plan was approved plus two additional years.

Upon the expiration of an approved FAP *for which approved assets were not purchased*, departments are required to re-justify the need to acquire these asset(s) through submission of a new FAP and required documents.

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(Continued)

KEY DUE DATES AND TIMEFRAMES

4127 (Cont. 1)

(New 2/2016)

Timeframe for ZEV Purchase Orders Approval:

Purchase orders for ZEVs must be issued within the same fiscal year or three months after receiving a FAP approval, whichever is later.