Topics

• Fleet Management Responsibility
• Fleet Administration vs. Fleet Management
• Headquarters vs. Field Fleet Manager
  • Commonalities
  • Key Functions
  • Priorities
  • Typical Issues
  • “The Squeeze”
• “Bridging the gap” between Headquarters and Field
Fleet Management Responsibility

Federal Management Regulation (FMR)

• §102-34.5 governs ”, … the economical and efficient management and control of motor vehicles that the Government owns, leases commercially or leases through GSA.”

• §102-34.345 states that federal agencies are responsible for:

  “. . . accounting and reporting procedures . . . [that] will ensure accurate recording of inventory, cost, and operational data needed to manage and control motor vehicles, and will satisfy reporting requirements.”
To manage and control, you need...

- **Accounting/reporting tools/methods**: Do you have a fleet management information system (FMIS), performance standards, and standard processes for field reporting?
- **Accurate inventory data**: Are owned/leased inventories, VINs, and data fields correct? Are you capturing asset level data?
- **Accurate cost data**: Are you capturing quantity and cost data for (in-house & commercial) fuel/oil consumption, added wear/tear, maintenance/repair, up-fitting, accidents, and indirect expenses?
- **Accurate operational data**: Are you capturing vehicle in-service dates, miles/hours/trips, passenger counts?
Fleet Administration vs. Fleet Management

- Managers and administrators perform many of the same functions within an organization, though their focus may be different (Ex: staffing, inventory, planning, and budgeting)
- While management is generally considered a sub-function of broader-scope administration, a manager may perform both functions depending on where s/he resides w/in the organization
  - Administrators formulate and execute major decisions that impact the organization
  - Managers plan, organize, lead, and control organizational units/people and employ resources as needed to meet administrator-defined policies and goals

“Managers manage what administrators administer”
Fleet Administration vs. Fleet Management

• **Administration** is commonly identified with activities performed at the “headquarters” level

• To **administer** the fleet, you need to capture, analyze and use data for decision-making, and exercise actual control over:
  • Establishing organizational goals/objectives
  • Formulating organizational policy
  • Strategic planning
  • Budgeting and finance
  • Acquisition planning
  • Developing an optimal fleet profile
  • Administering a fleet management information system
  • Collecting/aggregating/reporting fleet data (FAST)
  • Conducting agency-level studies
Fleet Administration vs. Fleet Management

• *Management* is generally associated with mid-level entities that *implement* plans and policies in an effort to meet organizational objectives while doing so within administrative parameter.

• To *manage* the fleet, you need to focus on performance of fleet-related tasks such as:
  • Report preparation
  • Contract oversight
  • Vehicle license plates
  • Maintenance activities
  • Fleet inventory, assignments, reassignments, and disposals
  • Charge card/fuel card charge verification
  • FAST data collection and entry
HQ & Field Fleet Manager Commonalities

HQ and Field share many of the same frustrations

• FAST: but from different ends of the process
• Information Systems: but from different ends of the process
• Fleet acquisition planning
• Staffing
• “Do More with Less”
Key Fleet Management Functions - HQ

- Regulatory Review/Interpretation/Applicability/Compliance
- Establishing/Enforcing Policy
- FMIS Administration
- Agency-Level Data Collection
- Agency-Level Reporting
- Home-to-Work
- Official Use
- Budget Preparation
- Procurement Planning
- Vehicle Allocation Methodology (VAM)
- Optimal Fleet Profile (OFP)
- Attend Inter-Agency Meetings
- Other?
Key Fleet Management Functions - Field

- Vehicle Acquisition/Disposal
- Vehicle Replacement
- Vehicle Assignment
- Vehicle Maintenance/Repair
- Vehicle Utilization
- Procurement & Supply
- Vehicle Operation
- Equipment Operation
- Home to Work
- Official Use
- Local Policy
- Policy Enforcement
- Shuttle Bus/Taxi Service
- Mail/Supply Delivery
- Mechanic Supervision

- Motor Pool Management
- Dispatching
- Outsourcing
- Accident Management
- Fuel Procurement & Supply
- Fuel Delivery
- License Plates
- Citation Adjudication
- Facility Management
- Vehicle Telematics
- Alternative Fuels
- Operator/Driver Training
- “Miscellaneous Duties as Assigned”
- Other?
Who is Responsible?

• FAST reporting (82%)
• Preventive maintenance (72%)
• Tracking utilization (71%)
• Regulatory compliance (63%)
• Vehicle acquisitions (58%)
• Replacement planning (57%)
• Retention justification (55%)
• New vehicle justification (50%)
• Fuel procurement (47%)
• GSA Fleet interface (40%)

• Maintenance/repair (35%)
• Fueling service (34%)
• AFV acquisition (33%)
• Commercial vehicle maintenance (28%)
• Establish mark-up rates for fuel/parts/etc. (20%)
• Repossess under-utilized vehicles (12%)
• Establish shop chargeback rates (11%)
Priorities - HQ

- Compliance:
  - EPACT/EISA
  - Executive Orders
  - Implementing Instructions
  - Laws
  - Federal Management Regulations
  - Agency policy
  - Establish/enforce agency fleet policy
  - Reduce fleet size/cost
  - “Green Fleet” Initiatives

- FAST (what the field submits)
- Home-to-Work Oversight
- Staffing
- Budgeting
- Acquisition planning

“What the federal government needs”
Priorities - Field

- Mission focus
- Stakeholders’ Requirements vs. “Desirements”
- Keep drivers happy
- Keep vehicles running
- Acquire new vehicles
- Managing “Big Iron” (in addition to NTVs)
- FAST

- Fuel/Parts management
- Data collection/reporting
- Training
- Personnel issues/Unions
- Accidents
- Vendors
- Other duties as assigned

“What the boss wants”
Typical Issues - HQ

- Fleet is a comparatively small portion of agency administrations and budgets
- Property, financial, maintenance or personnel divisions at headquarters typically drive information system solutions
  - Some large agencies continue to struggle to implement a centralized FMIS that meets fleet management needs for fleet vehicles and motorized equipment
- FAST reporting has become an end unto itself rather than a tool for managing the fleet (especially with the advent of asset level data requirements)
- Insufficient and/or decentralized management and control of off-road equipment (i.e., non-NTVs)
Typical Issues - Field

- Fleet is often a part-time duty, especially at small or remote field locations; “oversight” vs. “management”
- Personnel knowledge, experience and grade levels, and responsible departments/divisions vary
- Large agency survey revealed severe lack of formal fleet management training (96%)
- Local supervisors lack money or don’t see value in fleet training
- “I’ve been doing this a long time…I know what I’m doing”
- “This is the way I was taught to do it/we’ve always done it.”
- The local vehicle Fleet Manager typically is responsible for FAST reporting, assuming there is a local FM, but may lack authority to enforce data collection protocols
Typical Issues - Field (cont’d)

- Local sub-fleet managers are often unaware of maintenance management system and its use
- Equipment managers are often unfamiliar with FAST reporting requirements and GSA Fleet capabilities for equipment rental
- Different individuals in different divisions may manage vehicles and equipment (decentralization and lack of standardization)
- Decentralized management leads to decentralized results and hinders the fleet manager’s ability to manage the fleet and ensure compliance with fleet-related laws, regulations, and directives
Typical HQ vs. Field Issue – FAST

- HQ does not establish data-gathering, calculation, and reporting standards (indicating need of a FAST Handbook)
- No standard processes established for field data-gathering and reporting (indicating need of an SOP)
- No FMIS in place to standardize data-gathering and reporting
- Unaware of FAST reports available on GSA Reports Carryout
- FAST is not used as a fleet management tool
  - Unaware of the FAST Data Quality Consistency Report, FAST Sandbox, or how to sort/read/apply data tables/charts
- Increased data/reporting demands w/no personnel increase
- As data moves up the hierarchy, lack of oversight impacts data collection, consistency and quality
- Staffing turnover and loss of “corporate knowledge”
“The Squeeze” on the HQ Fleet Manager

On one side…
• Boss
• CFO
• CAO
• FMR
• US Code
• Executive Orders
• CEQ
• Congress
• OMB
• DOE
• GSA

And on the other side…
• HQ Fleet Staff
• Bureau Fleet Managers
• Regional Fleet Managers
• Field Fleet Managers
• Sub-Fleet Managers
“The Squeeze” on the Field Fleet Manager

On one side…
• HQ Fleet Manager
• The Local Boss
• Finance

And on the other side…
• Customers
• Property Management
• Facility Management
• Risk Management
• Safety & Security
• Environmental
• Human Resources
• Employees/Unions
• Local Government
• General public
Bridging the Gap

How can you “bridge the gap” between headquarters and the field to instill changes needed to align goals and objectives?
Why Does Change Fail?

- Poor communication
- Lack of implementation planning
- Lack of support from top management
- Unclear rationale for change
- Multiple competing initiatives/priorities
- Lack of focus, commitment, and/or continuity
- Lack of understanding the urgency for the change
- Inadequate employee involvement/”buy-in”
- Complacency/apathy
- Resistance due to “full circle” changes or re-branding of past changes that are viewed as failures
- Demographics
Bridging the Gap – Establish Fleet Policy

Key benefits to be derived from agency fleet policy include:
• Encourages planning and goal setting
• Fosters effective problem-solving strategies
• Provides supervisors with standard guidelines
• Promotes teamwork; reduces squabbling
• Reduces “crisis” communication
• Contributes to employee and organizational success
• Reduces supervisor and employee anxiety
• Improves control over costs and operations
• Standardizes processes in multiple locations
• Reduces confusion, questions, errors
Bridging the Gap – Institute an FMIS

Key benefits to be derived from a single FMIS include:
• Improves central fleet management
• Standardizes data capture
• Provides for:
  • Timely response to reporting requirements/data calls
  • Current and electronically available inventory data
  • Current, complete, and electronically available maintenance and fuel costs
  • Availability of data essential to development of a comprehensive replacement plan
• Standardizes methodology for replacement planning
• Improves tracking and reporting of fleet performance measures
• Eliminates manual data capture and calculation
Bridging the Gap – Headquarters FM

• Get out of the office and into the field ("MBWA"/be human)
• Form alliances (CFO, Environmental, Property, GSA, IG)
• Set challenging but attainable/sustainable goals & timelines
• Establish policy, including action-options for under-utilized vehicles (motor pool, rotation, disposal, etc.) and robust justification tools for adding vehicles
• Establish standard data collection and reporting procedures so everyone captures the same data in the same way and reports in a standard format
• Create and communicate training programs for field staff, including upward mobility initiatives
• Establish metrics that tell a story, then tell the story!
  • Fleet age, reduced accidents/downtime/cost-per-mile/fuel use
  • Celebrate successes, but don’t gloss over shortfalls
Bridging the Gap – Field FM

- Form alliance(s) with HQ, Sustainability Officer, Risk, Safety, HR
- Engage user groups: Avoid being the “procurement police” by creating a vehicle acquisition and allocation team
- Ensure data accuracy - follow standard operating procedures to capture and report data
- Establish a local fleet baseline/table-of-equipment
- Associate vehicles with metrics beyond utilization - hours, trips, passengers, number of accidents, standby hours
- Track incidents of unscheduled maintenance and repair
- Track fleet availability rate (leased vs. owned)
- Determine GHG and petroleum use penalty and potential safety issues from retaining “obsolete” vehicles
- Have users develop plan of use (justification) prior to procuring new/replacement vehicles
Bridging the Gap - Headquarters & Field FM

- Improve Communications!
  - Training (Face-to-face, Web-recorded, WebEx)
  - Alternative Communication: Teleconference, WebEx
  - Website: “All things fleet” in one place
  - Standard suite of electronic tools
    - Repair vs. replace
    - Lease vs. own
- Standard guidance
  - Operating policies/procedures
  - FAST Handbook
  - Fleet report templates
- Align Job Performance Standards to mission - reduce “other duties as assigned” distractions
- Collaborate on establishing goals and objectives tied to mission
Summary

• Lines between fleet administration and fleet management can overlap, and are often somewhat blurred
• Headquarters fleet managers and field fleet managers have many similar and many dissimilar responsibilities
• Change requires good communication, focus, planning, stakeholder “buy-in,” and support of top management
• Bridging the gap” between headquarters and the field takes conscious effort by both headquarters and field fleet managers

Questions?
“Specializing in the science of fleet management”

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