



Presenters

Cindy Dixon

NCSFA Past President
State of Missouri

Bob Williams

NCSFA President
State of Tennessee

Our Vision and Mission

- **Vision Statement:** NCSFA's vision is to be the leading organization representing government fleet managers.
- **Mission Statement:** NCSFA connects managers from state, local, university and department of transportation government fleets and trade representatives to: network, benchmark and share educational opportunities relating to the transportation solutions and alternatives for the enhancement of its members and the industry.



History – Our Members

- Formed in 1986
- Our Members
 - State Fleets - 37
 - University Fleets - 25
 - Municipal Fleets -3



Executive Committee

President: Bob Williams, Tennessee

Past President: Cindy Dixon, Missouri

President Elect: Scott Edwards, Colorado

Vice President: Tara Merrifield, New Hampshire

Treasurer: Harmony Wilder, Vermont

Secretary: Robin Rehborg, North Dakota

Members – at – Large:

Kathy Wellik, Iowa State University

Jeff Mottishaw, Utah

Beth Neeman, Delaware



Benefits of Membership

- Benchmarking Surveys
- Vincentric Lifecycle Cost Analysis Software – Free with Membership
- Online Member Forums
- Ad Hoc Surveys
- Webinars and Roundtables
- Members Only Content on NCSFA website
- Free registration to annual workshop



NCSFA **2017**

STATE FLEET MANAGERS WORKSHOP

**September 12-14
Des Moines, Iowa**



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Administrators, Inc.



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Benchmarking Survey

- 34 States Responded
- Data gathered in Spring of 2016
- Survey Modules
 - Fleet Organizational Structure
 - Replacement, Purchasing and Internal Rates
 - Maintenance, Repair and Vehicle Recalls
 - Fuel
 - Utilization
 - Telematics



State Fleet Organizations

- State Fleet Office Staffing Average: 10.7 FTE
- Average Number of Vehicles: 5,259
- How are state fleets organized? Centralized vs. Decentralized?
 - Who holds the decision making authority? State fleet or agencies?
 - Vehicle Purchasing
 - 71%: state fleet makes vehicle purchasing decision
 - Others represent a combination of the following:
 - Decentralized with agencies making the decision; or
 - Agency obtains approval from state fleet
 - Maintenance & Repair of Vehicles
 - 65% of states centralize maintenance and repair decisions on vehicles



Common Fleet Responsibilities

Surveyed Responsibilities

- Take Home Vehicle Tracking – 62%
- Utilization – 100%
- Policy Compliance – 91%
- Fleet System Management – 85%
- Mileage Tracking – 100%
- Vehicle Review and Approval – 94%

Other Common Responsibilities

- Fuel Card Program Administration
- Rental Vehicle Contract Administration
- Fleet Safety
- Motor Pool Management
- Vehicle Disposal
- Policy Development



Vehicle Acquisition Methods

1. Purchase

- 47% purchase 100% of their fleet
- 74% purchase 85% or more of their fleet

2. Leasing

- 9 states lease vehicles (ranging from 1-100% of their fleet purchases)

3. Financing

- 5 states financed vehicles (ranging from 10-59% of their fleet purchases)



Fleet Replacement Guidelines

Types of Replacement Criteria

- Mileage criteria – 97%
- Age criteria - 90%
- Repair Cost to Vehicle Value - 58%
- Some have a combination of two or more of these criteria

Survey Average Replacement Criteria (passenger vehicles)

- 114,310 miles
- 8 years



Fleet Condition

Average odometer readings for vehicles currently in service

- Mid size sedan: 66,060
- ½ ton truck: 69,745
- SUV: 66,306
- Minivan: 66,192



Replacement Budget

Prior Year Vehicle Spending

- \$12.2 M (average)
- 50% of states indicated that spending fell short of needs
- Funding Trends (last fiscal year versus prior year)
 - 53% increase
 - 28% no change
 - 19% decrease



Vehicle Funding

Source of Funds

1. Internal Service Funds

- 34% of states solely utilize internal service funds
- 41% of states fund 50% or more with internal service funds

2. Ongoing Annual Appropriations

- 41% of states fund 50% or more with ongoing annual appropriations
- 13% rely solely on ongoing annual appropriations

3. Ad-hoc (one time) Appropriations

- 19% utilize ad-hoc appropriations at varying levels



Vehicle Pricing & Priorities

Average Vehicle Contract Pricing

- \$18,429 Mid Size Sedan
- \$23,602 1/2 ton truck
- \$22,572 Compact SUV

Most Important Considerations When Purchasing Vehicles

1. Lifecycle Cost
2. Agency/User Discretion
3. Federal EPACT Compliance
4. Air Quality Benefits
5. Energy Independence
6. Greenhouse Gas Pollution



Charges to User Agencies

1. Monthly Lease

- 64% of states lease out vehicles to agencies on a monthly basis
- Average monthly charge for a mid size sedan was \$289
- Additional per mile rates are charged in some states

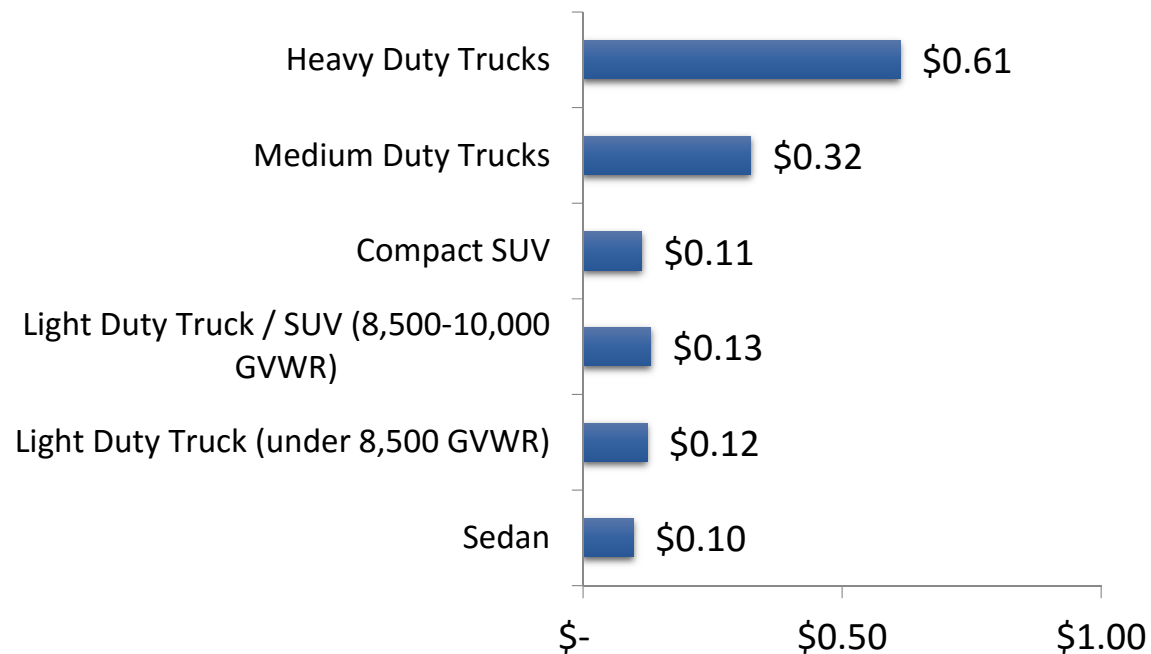
2. Daily Rental

- 64% of states have a daily rental motor pool
- Average daily rate for a mid size sedan was \$29.49
- Additional per mile rates are charged in some states



Maintenance & Repair Costs

Maintenance & Repair Cost Per Mile



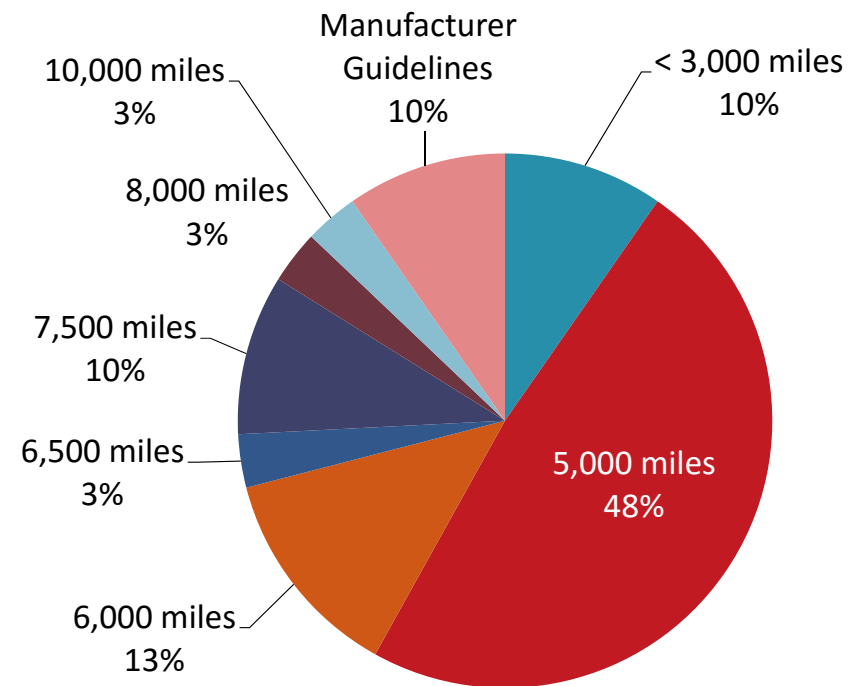
- Average Annual Cost per State = \$6.9 M
- Average Outside Labor Rate = \$86.59/hour



Preventative Maintenance

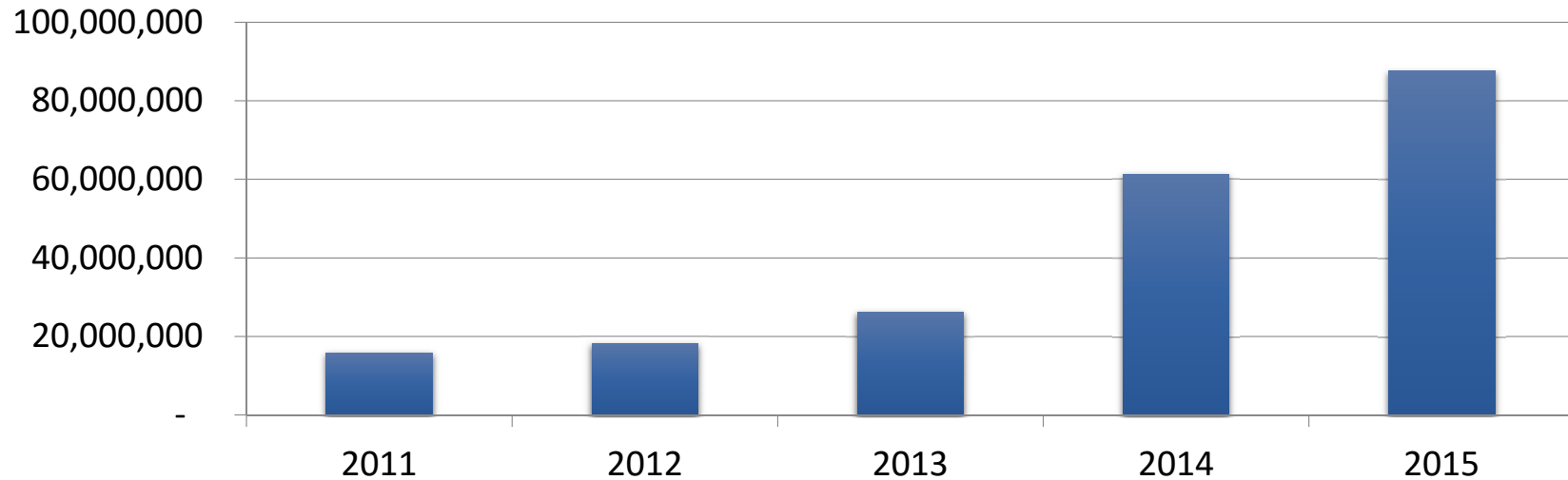
- 74% of states track preventative maintenance compliance on their vehicles
- Of the states that track compliance, the average compliance rate is 85%

Maintenance Intervals

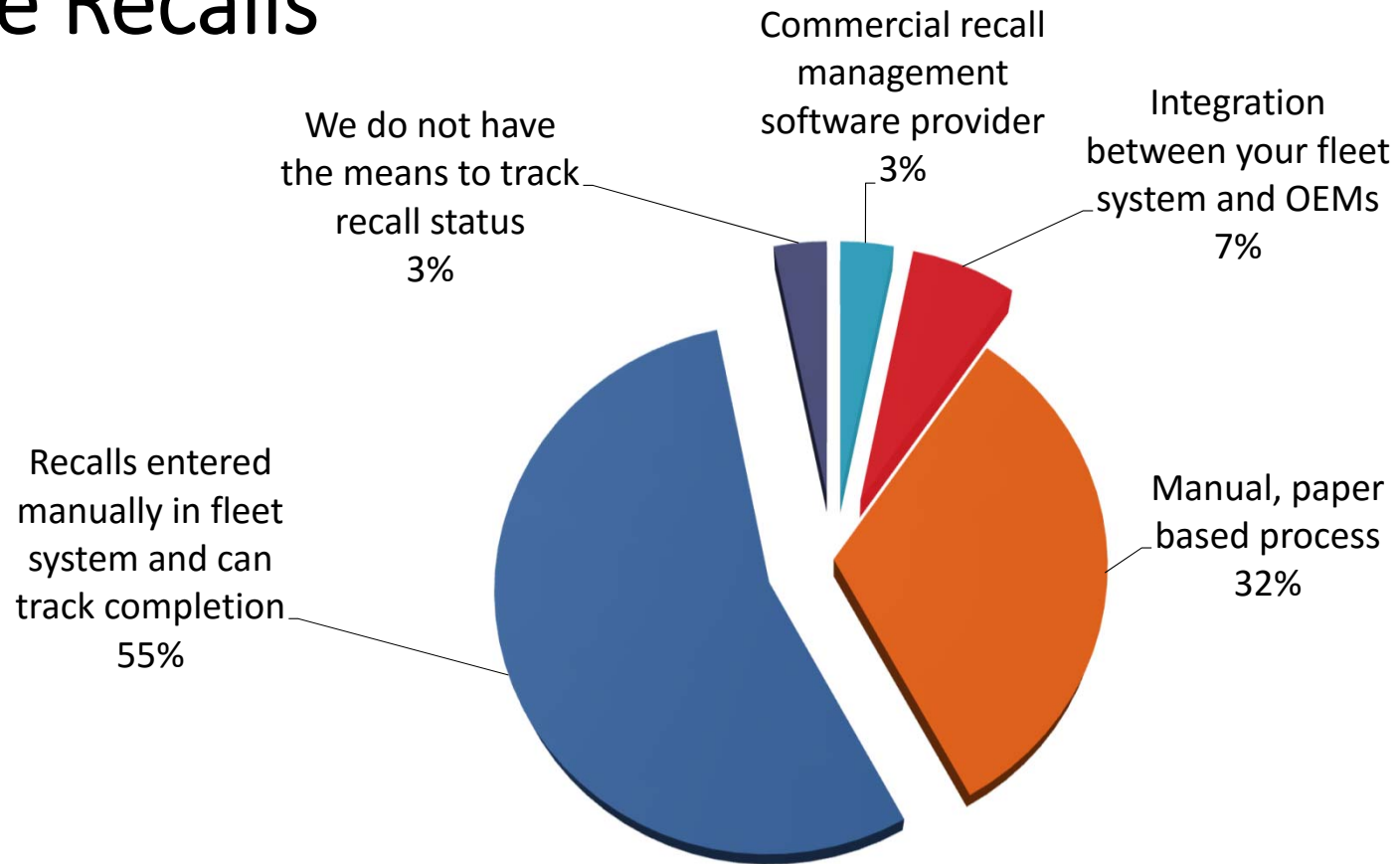


Vehicle Recall data from NHTSA

Vehicle Recalls - Nationwide

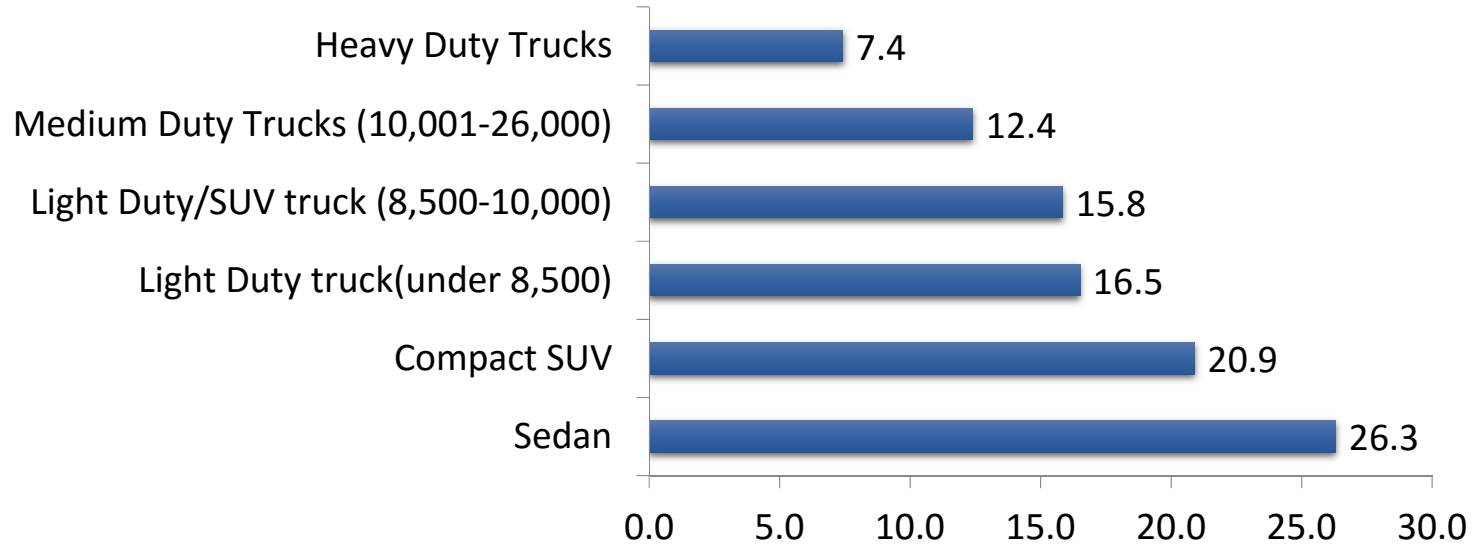


Vehicle Recalls



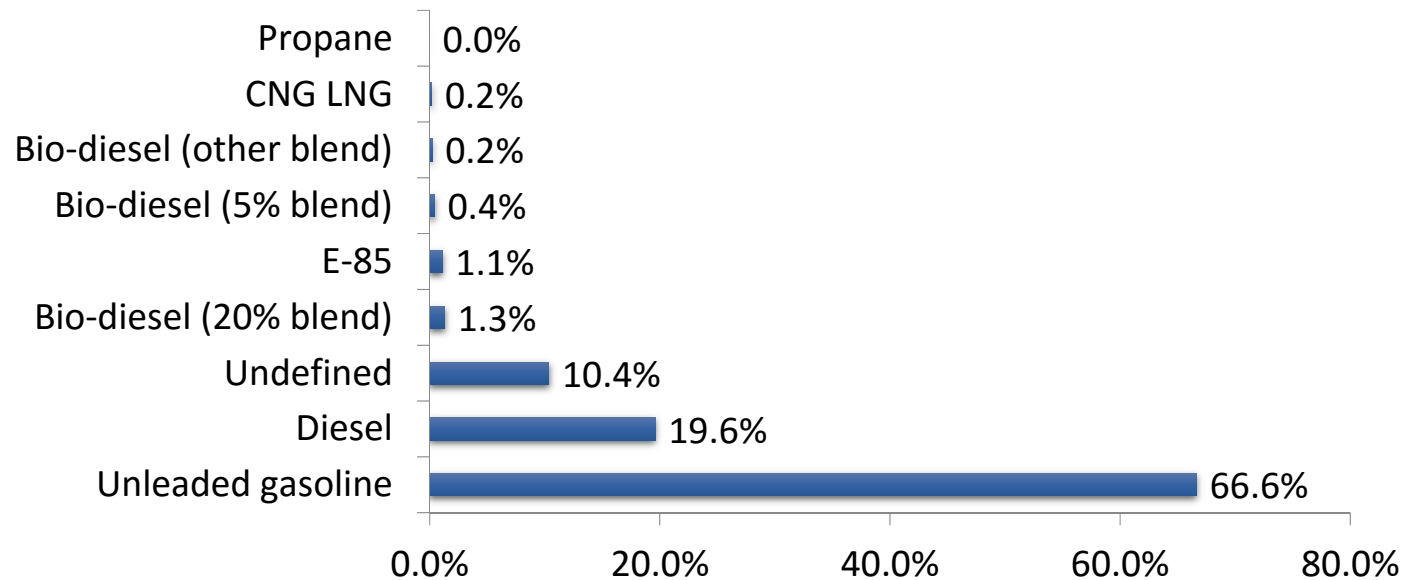
Fuel Economy

MPG by Vehicle Class



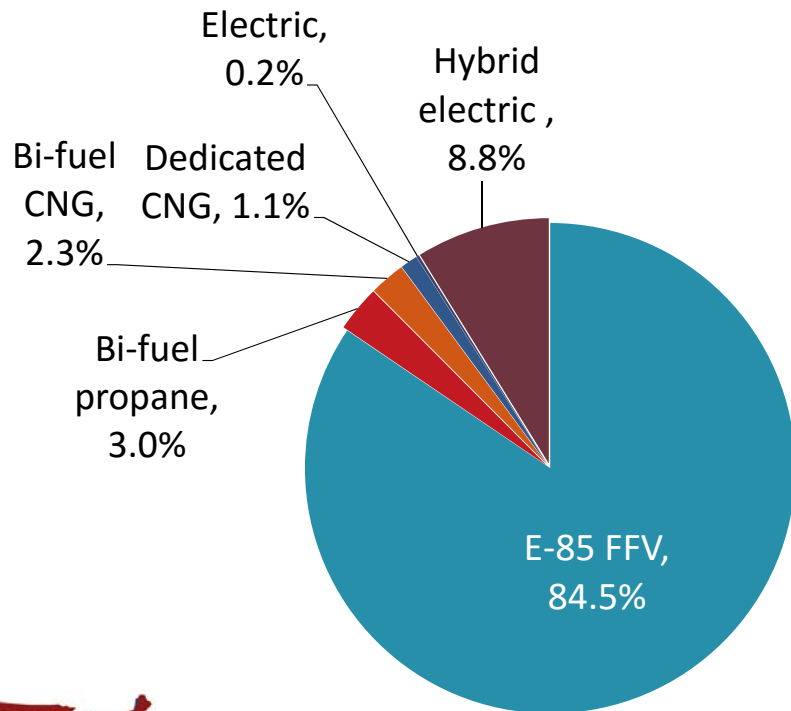
Fuel Types Used

NCSFA Annual Fuel Usage by Fuel Type

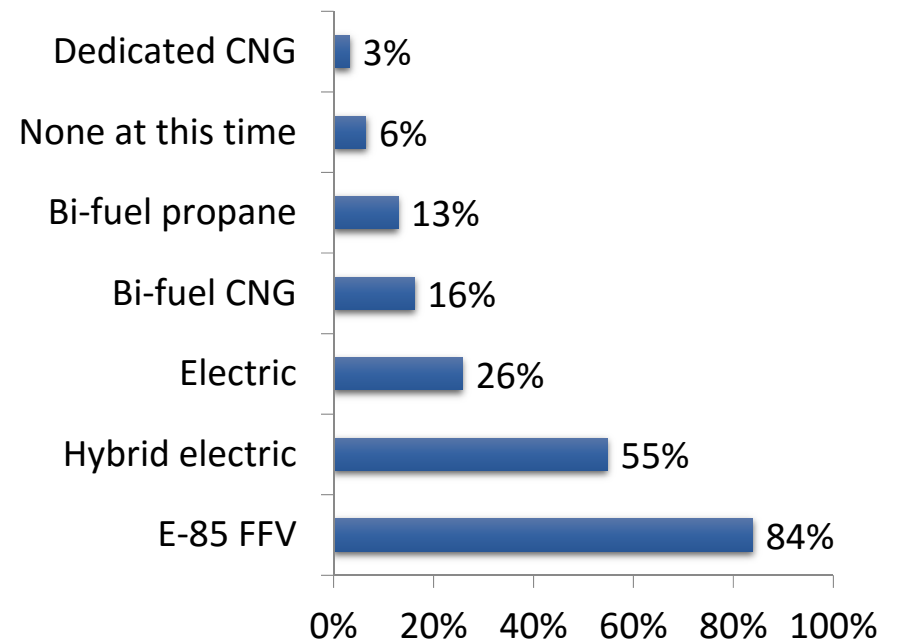


Alternative Fuel/Advanced Technology Vehicles

Current Alternative Fuel Vehicles by Type

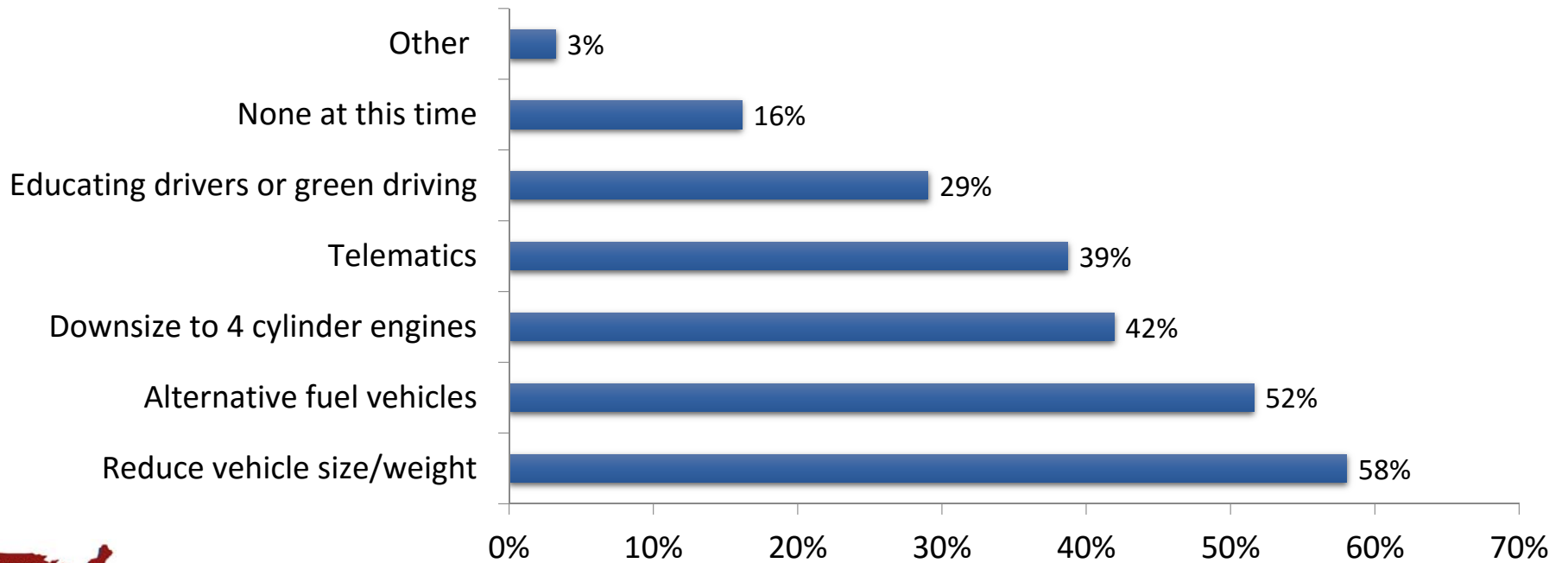


Future Vehicle Purchasing Plans



Fuel Reduction Strategies

Fuel Reduction Strategies Deployed in State Fleets



Business Miles Driven

- 85% of states supplied total miles driven data for their state vehicles
- For the 29 states that supplied this data:
 - 1.9 billion miles driven for 69,000 vehicles (survey total)
 - Average annual miles driven 11,625
 - Median annual miles driven 12,584



Utilization Standards

- 80% of states have utilization standards in place
- 73% of states have a process to review underutilized vehicles
- Utilization standards are tracked by miles driven per month, year or percentage of days used.
- Standards are unique in each state but typically based on the vehicle assignment (how it is used) or vehicle class (sedan, truck, etc)
 - Examples of different standards based on use: Pool, Individual, Campus Operation, Urban vs. Rural, Specially Equipped, etc...
- Survey Average Annual Minimum Requirement: 10,478 miles



Utilization Statistics based on Actual Use

Survey Averages:

- Passenger Vehicles
 - 13,680 average annual miles or 70% daily use
- Vehicles Assigned to a Motor Pool
 - 14,550 average annual miles or 69% daily use
- Vehicles Assigned to an Individual
 - 13,508 average annual miles or 76% daily use



Telematics

Currently Using Telematics?	
No	58%
Part of fleet (specific applications)	19%
Pilot Program	13%
Yes (Fleet wide)	10%

39% of fleets that replied 'No' intend to undertake a pilot program or deploy telematics within certain applications in the next two years.

Reasons to Use Telematics

Ranked in priority order

1. Record Mileage
2. Record Driving Location
3. Monitor Idle Time
4. Monitor Speeding
5. Monitor Vehicle Warning Codes
6. Track Aggressive Drivers
7. Dispatch service



Conclusion

- Full report with individual answers to each question available in the Member's Only section of the NCSFA website.
- www.ncsfa.net
- Is your state a member?
- 2017 Annual State Fleet Manager's Workshop, September 12 – 14th
- Thanks to NASCA for your partnership!



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Thank you!



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