

# SAM – ACQUISITION OF VEHICLES

## ACQUISITION OF VEHICLES

4120

(Revised: ~~024/20262~~)

### Legal Authority

Government Code section 13332.09

Executive Order B-2-11

### Definition

**Fleet Acquisition Plan (FAP):** A standardized approval request that state agencies (Agencies) must submit to the Department of General Services (DGS), Office of Fleet and Asset Management (OFAM), prior to acquiring fleet assets.

**One-Time Acquisition (OTA):** Procurements conducted by DGS Procurement Division (PD) on behalf of state departments for purchases that exceed a department's delegated purchasing authority. Refer to PD's website for additional information.

**State Fleet Asset:** Defined in SAM 4100.

### OverviewPolicy

The Department of General Services (DGS), Office of Fleet and Asset Management (OFAM), approves the acquisition of state fleet assets. Agencies shall submit a Fleet Asset Plan (FAP) for approval prior for:

- Acquisition of new fleet assets
- Replacement of existing assets
- Entering into a temporary long-term lease (TLTL) exceeding 12 months.

~~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:~~

~~Agencies shall not issue a purchase order (PO) for a state fleet asset without prior approval from OFAM. "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."~~

## I. Submission and Approval Process

### A. FAP

## SAM – ACQUISITION OF VEHICLES

Starting July 1 and **no later than the first business day of February**, agencies may submit complete FAPs directly to [FAMSSupport@dgs.ca.gov](mailto:FAMSSupport@dgs.ca.gov). Agencies must submit a complete FAP packet to ensure prompt processing. Refer to the OFAM website for the list of required documents.

### B. Addendums

Addendums to an approved FAP may be accepted during the fiscal year due to extraordinary circumstances. Justification for extraordinary circumstances may include:

- An unexpected loss of an asset, requiring replacement;
- Leasing or renting equipment for more than 12 months;
- Emergency fleet acquisition needs.

### C. POs

Agencies may begin issuing POs once OFAM approves the FAP. [FAP approvals for acquisitions with a PO are valid for the fiscal year approved, plus one additional fiscal year.](#)

### D. One-time Acquisitions (OTA)

Agencies can submit OTA requests to the DGS Procurement Division (PD) once the FAP is approved by OFAM. [FAP approvals for acquisitions requiring a DGS PD OTA approval with a PO are valid for the fiscal year approved, plus one additional fiscal year.](#)

## II. Extensions

Requests for extensions must ~~provide~~[include](#) a written justification as to why the asset(s) were not purchased during the approved period and indicate the operational need. FAP extension requests are granted on a case-by-case basis.

~~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 [FAP Documents](#):~~

## SAM – ACQUISITION OF VEHICLES

~~Fleet Acquisition Plan Narrative~~

~~Fleet Acquisition Plan Spreadsheet~~

~~Fleet Acquisition Certification~~

~~Other Supporting Documents, as applicable~~

~~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.~~

### ~~Fleet Acquisition Plan Spreadsheet~~

### III. Key Deadlines

<u>July 1</u>	<u>February 1</u>	<u>April 1</u>	<u>June 30</u>
<u>First of the fiscal year, OFAM begins accepting FAPs.</u>	<u>Last day to submit a FAP for the fiscal year.</u>	<u>Last day to submit a purchase estimate for an OTA to DGS PD.</u>	<u>Last day of the fiscal year.</u>

~~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 the department Director or the Chief Deputy Director. If there is no Director or Chief Deputy Director within the state entity, the signature shall be by the highest level of the executive staff within the applicable state entity. Designees are not acceptable. If the state entity reports to an Agency, the certification must also be signed by the 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.~~

## SAM – ACQUISITION OF VEHICLES

### ~~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, via email to the department's assigned FAMS analyst, on or after the first day of the fiscal year (July 1) for which the FAP is being submitted and no later than:~~

## Responsibilities

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### OFAM:

1. Process FAP package to ensure compliance.
2. Approve purchasing documents for fleet assets following FAP approval.
3. Reviews and approves extensions, if appropriate.

### Agency

1. Submit completed FAP by key deadlines.

## Resources

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- FAP Required Documents
  - OTA Guidelines
  - Fleet policy questions: [FleetPolicy@dgs.ca.gov](mailto:FleetPolicy@dgs.ca.gov)
  - FAP Questions, Submissions, or to Request FAP Forms Packet: [FAMSSupport@dgs.ca.gov](mailto:FAMSSupport@dgs.ca.gov)
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- ~~• 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.~~

~~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-~~

## SAM – ACQUISITION OF VEHICLES

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*.