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STATE - OWNED VEHICLE STUDY OCTOBER, 2012

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BASIS FOR SUBMISSION

The Procurement Policy Board (PPB) has elected to conduct a study regarding the Illinois State-owned vehicle fleet. The study is a comprehensive overview of the fleet vehicles which are assigned to agencies under the Governor via the Department of Central Management Services (CMS) and the State-owned fleet purchased and maintained by selected State universities to include Northern Illinois University (NIU), Southern Illinois University at Carbondale (SIUC) and the University of Illinois at Urbana-Champaign (UIUC).

Included in the study are the policies and guidelines, provided by CMS, NIU, SIUC and UIUC, which govern the use of State and University-owned vehicles. These policies and guidelines give an overview of the acquisition, maintenance, operation and disposal of State and University-owned vehicles as well as the methods employed to provide oversight and control with regard to employee driver use of the State-owned fleet.

In November 2011, the Office of the Auditor General (AG) released a Performance Audit of the Department of Central Management Services' Operation of the State Vehicle Fleet which focused on Fiscal Years 2009 and 2010. It is important to note the distinction between the AG audit and this study. This PPB study focuses not only on CMS but on selected State universities as well. The information contained in the study is from fiscal year 2011.

STUDY OBJECTIVE

The purpose of this study is to provide an overview and assessment of the State-owned vehicle fleet as well as to compare and contrast policies and procedures that govern the use of State-owned vehicles in agencies under the Governor, CMS and selected State universities.

PROCUREMENT POLICY BOARD REQUEST

The Procurement Policy Board (PPB) elected to survey the Department of Central Management Services (CMS) including agencies under the Governor, Northern Illinois University (NIU), Southern Illinois University at Carbondale (SIUC) and the University of Illinois at Urbana-Champaign (UIUC) for information regarding the State and University-owned vehicle fleet

The PPB requested that each entity provide responses to the survey questions and policy requests provided below.

1. How many of each category of vehicles described below are assigned to or owned or leased by your agency/university, statewide?
 - Passenger cars
 - Trucks up to 1.5 tons
 - Other size trucks
 - Minivans
 - Vans – passenger
 - Vans – other
 - Sport Utility Vehicles (SUV’s)
 - All other vehicles
2. How many of each type of vehicle are permanently assigned to individual employees?
 - Passenger cars
 - Trucks up to 1.5 tons
 - Other size trucks
 - Minivans
 - Vans – passenger
 - Vans – other
 - Sport Utility Vehicles (SUV’s)
 - All other vehicles
3. How many and what type of vehicles are assigned to employees as take home vehicles?
 - Passenger cars
 - Trucks up to 1.5 tons
 - Other size trucks
 - Minivans
 - Vans – passenger
 - Vans - other
 - Sport Utility Vehicles (SUV’s)
 - All other vehicles
4. Provide a copy of your agency/university take home and or personal use policy.
5. Provide a copy of your agency/university mileage/maintenance log in, log out policy.
6. How many vehicles at your agency/university have 150,000 miles or more?

7. Provide a copy of your agency fuel, maintenance and inspection policy.
8. Describe the logistics of your bulk fuel storage and dispensing facility(ies).
9. What method of payment is used by employees who purchase fuel?
10. Provide a copy of your agency/university new/used vehicle procurement policy.
11. How many single vehicles were purchased under the small purchase threshold in FY11?
12. Provide a copy of your agency/university vehicle disposal policy.
13. What was your agency/university total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles?
14. Describe any type of GPS or tracking devices that are currently in use on the State-owned vehicles assigned to your agency/university.

FINDINGS

Illinois Department of Central Management Services

The Department of Central Management Services, Division of Vehicles responded to the Procurement Policy Board request by providing the following information.

1. How many of each category of vehicles described below is assigned to or owned or leased by your agency statewide?

	<u>Agencies under the Governor</u>	<u>CMS Agency Fleet</u>
Passenger cars	4117	124
Trucks up to 1.5 tons	3038	34
Other size trucks	2461	12
Minivans	869	47
*Vans –Passenger	1014	104
*Vans –Other		
Sport Utility Vehicles (SUV's)	649	17
**Other	14	0
Total	12,162	338

*Passenger and Cargo vans not tracked separately. Data available as of 9-10-12.

**Motorcycles.

2. How many of each type of vehicle are permanently assigned to individual employees?

	<u>Agencies under the Governor</u>	<u>CMS Agency Fleet</u>
Passenger cars	700	1
Trucks up to 1.5 tons	1078	0
Other size trucks	18	0
Minivans	199	0
*Vans-Passenger	39	0
*Vans-Other		
Sport Utility Vehicles (SUV's)	110	0
Other		0
Total	2144	1

*Passenger and cargo vans not tracked separately in this format, based on 2011 reports from agencies. Note: Sworn law enforcement exempt from reporting to CMS.

3. How many and what type of vehicles are assigned to employees as take home vehicles?

	<u>Agencies under the Governor</u>	<u>CMS Agency Fleet</u>
Passenger Cars	692	1
Trucks up to 1.5 tons	1053	
Other size trucks	18	
Minivans	195	
*Vans-Passenger	39	
*Vans –Other		
Sport Utility Vehicles (SUV’s)	110	
Other		
*Total	2107	1

*Of 2144 permanently assigned to individuals categorized by type above, 2107 are take home. Agencies reported 37 of the 2144 permanently assigned to individuals are not take home.

4. Provide a copy of your agency take home and or personal use policy.

CMS and all agencies under the Governor are subject to CMS/JCAR Rules 5040 Title 44. Governor’s Office/CMS Policy (Exhibit a1), Governors Office and CMS fleet policies apply to all agencies under the Governor. ILCS 5040 CMS/JCAR Rules also apply to CMS and agencies under the Governor. (CMS internal policy Exhibit a2).

See Exhibits a1 and a2 for additional information.

5. Provide a copy of your agency mileage/maintenance/log-in, log-out policy.

The Automotive Cost Report/Vehicle Log (Exhibit a3), is used to record daily gasoline, oil, lube, repair parts and labor, tires, battery, anti-freeze and miscellaneous purchases. It is also used to record beginning and ending mileage, origin, stops and final destination.

The CMS Trip Log (Exhibit a4) includes the equipment and license number, approval signature, date, driver name, beginning and ending mileage, number of passengers and destination.

The CMS Memorandum dated July 27, 2011, (Exhibit a5) addresses Maintenance and Lube, Oil and Filter Change Interval Policy for Passenger Vehicles. Details about oil change and tire rotation intervals are included in the memorandum.

See Exhibits a3, a4 and a5 for additional information.

6. How many vehicles at your agency have 150,000 miles or more?

<u>Agencies under the Governor</u>	<u>CMS Agency Fleet</u>
*5829	*304

*Response based on CMS tracking passenger vehicles by age and mileage 8 years plus or 150,000 miles as of 9-10-12 and large trucks data based on 11 years plus. Meter reading validation would require individual agency confirmation by vehicle.

7. Provide a copy of your agency fuel, maintenance and inspection policy.

The CMS Memorandum dated July 27, 2011, (Exhibit a5) addresses Maintenance and Lube, Oil and Filter Change Interval Policy for Passenger Vehicles. Details about oil change and tire rotation intervals are included in the memorandum.

The text of Illinois Administrative Code 5040.410 Subtitle D, (Exhibit a10) addresses the CMS schedule of Inspection and Maintenance.

See Exhibit a5 and a10 for additional information.

8. Describe the logistics of your bulk fuel storage and dispensing facility(ies).

CMS provides fuel to agencies under the Governor by purchasing in bulk from contract fuel vendors for sales at CMS fuel station pump sites and through sales to agencies such as IDOT who also maintain underground fuel tanks. CMS purchases/sells Gasohol, E85, RFG and Biodiesel through these methods. Exhibit a8 is a listing of bulk tank sites.

See Exhibit a8 for additional information.

9. What method of payment is used by employees who purchase fuel?

State employees for agencies under the Governor utilize the CMS contract fleet card from vendor card Wright Express for purchases from commercial fueling facilities. State employees for agencies under the Governor are also issued a CMS credit card for fuel purchases from State garage facility pumps. Agencies purchasing bulk fuel from CMS are billed through the CMS mainframe billing system.

10. Provide a copy of your agency new/used vehicle procurement policy.

How To Acquire A State Fleet Vehicle January 2012 (Exhibit a6) provides information on the role of the Agency Vehicle Coordinator and the Agency Fleet Request Template and how they relate to new vehicle purchases, used surplus vehicle acquisition, used General Services Administration vehicles and CMS leased vehicles.

A CMS document (Exhibit a7) provides detailed instructions for completing an Agency Fleet Request Form.

CMS also included the State Employee Business Transportation Policy, March 2012 (Exhibit a9) which assists agencies in cutting the costs and environmental impacts of transportation and in choosing the most efficient transportation option available.

See Exhibit a6, a7, a9 for additional information.

11. How many single vehicles were purchased under the small purchase threshold in FY11?

CMS/Division of Vehicles did not purchase any vehicles under the small purchase threshold.

12. Provide a copy of your agency vehicle disposal policy.

Included in the instructions for How To Acquire a State Fleet Vehicle, January 2012, this document (Exhibit a6) also details replacement guidelines as well as how to turn in a used vehicle. The replacement guidelines for passenger vehicles are 150,000 miles and/or 8 years and for light duty trucks it is 175,000 miles and/or 6 years. In all cases, cost efficiency and safety are priorities in vehicle replacement decisions.

See Exhibit a6 for additional information.

13. What was your agency total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles?

	<u>Agencies under the Governor</u>	<u>CMS Agency Fleet</u>
Repair, maint. and fuel.	\$78,200,000.00	\$24,800,000.00
Vehicle purchases	\$23,900,000.00	\$ 4,600,000.00
Total	\$102,100,000.00	\$29,400,000.00

Note: Response based on IOC data for FY11. CMS revolves and bills agencies for \$23.1 Million of the \$24.8 Million.

Note: updated as of 9-12-12 reflecting \$300,000 in CMS vehicle purchases that other agencies then paid CMS for.

14. Describe any type of GPS or tracking devices that are currently in use on the State-owned vehicles assigned to your agency.

CMS does not own any GPS or other tracking devices on its agency fleet vehicles. CMS plans to initiate a study of this per the OAG Audit of Fleet and per [20 ILCS 405/405-280] was [20 ILCS 405/67.15] which was recently enacted.

Northern Illinois University

Northern Illinois University responded to the Procurement Policy Board request by providing the following information.

1. How many of each category of vehicles described below are assigned to or owned or leased by your agency/university, statewide?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	72
Trucks up to 1.5 tons	44
Other size trucks	15
Minivans	32
Vans – passenger	8
Vans – other	55
Sport Utility Vehicles (SUV's)	7
*All other vehicles	8
Total	241

*There are 7 buses and 1 police command vehicle in this category.

2. How many of each type of vehicle are permanently assigned to individual employees?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	2
Trucks up to 1.5 tons	0
Other size trucks	0
Minivans	0
Vans – passenger	0
Vans – other	0
Sport Utility Vehicles (SUV's)	0
All other vehicles	0
Total	2

3. How many and what type of vehicles are assigned to employees as take home vehicles?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	2
Trucks up to 1.5 tons	0
Other size trucks	0
Minivans	0
Vans – passenger	0
Vans – other	0
Sport Utility Vehicles (SUV's)	0
All other vehicles	0
Total	2

4. Provide a copy of your agency/university take home and or personal use policy.

This policy (Exhibit b1) details the guidelines on using university vehicles for official university business of faculty, administrators, graduate assistants and operating staff.

See Exhibit b1. (Section II, first paragraph of Procedure No. 8-5, Transportation Policies) for additional information.

5. Provide a copy of your agency/university mileage/maintenance/log in, log out policy.

Procedure No. 8-5, sections III and IV of the Transportation Policies document (Exhibit b1), provides information on how to obtain a pool vehicle as well as guidelines on when a vehicle is returned.

Procedure No. 8-8 in the Transportation Assigned Vehicle Mileage Log (Exhibit b5) document provides guidelines for maintaining the mileage log for university owned and leased vehicles.

See Exhibit b1 and Exhibit b5 for additional information.

6. How many vehicles at your agency have 150,000 miles or more? Provide a description of each.

<u>Veh.#</u>	<u>Description</u>	<u>Type</u>	<u>License</u>	<u>Serial Number</u>	<u>Assignment</u>
0001	MCI102D3 47 Pass	Bus	U6345	1M8SDMMA2SP046805	Pool
0003	Eldorado Aerotech	B16	U6353	1FDWE35F53HB33042	Pool
0005	MCIJ4500 56 Pass	B55	U6347	2M93JMFA88W064479	Pool
0006	MCIJ4500 56 P w/ lift	B55	U5884	2M93JMFA48W064480	Pool
0009	MCI102D3 49 P w/lift	B49	U6340	1M8SDMMA5RP046596	Pool
0499	2000 Buick LeSabre	sedan	U6294	1G4HR54K6YU321753	Admissions
1552	Chevrolet S10 pickup	truck	U5769	1GCCS19531K152906	Geology
2255	Dodge Caravan	mini/v	U136551	B4GP25382B549569	Pool
2262	Dodge Caravan	mini/v	U6262	1B4GP25322B549583	Parking
3264	Dodge Caravan extend	mini/v	U6219	1D4GP243X3B215830	Campus Mail
3265	Dodge Caravan extend	mini/v	U5987	1D4GP24313B215831	Athletics
3266	Dodge Caravan extend	mini/v	U234941	D4GP24333B215832	Pool
3267	Dodge Caravan extend	mini/v	U234931	D4GP24353B215833	Pool
4268	Dodge Caravan	mini/v	U6203	1D4GP24R54B601111	Pool
6292	Ford van w/lift	LNR	U6174	1FTNE24W26DA72594	Public Safety
9216	Ford 15 p van	LNR	U5978	1FBSS31LXXHB42630	Public Safety

Vehicle types LNR are buses used for Late Night Ride services for students needing late night transportation from campus library etc.

*****Additional Information below*****

<u>Veh.#</u>	<u>Odometer</u>	<u>Miles YTD</u>	<u>Year</u>	<u>Color</u>	<u>Parking</u>
0001	767,708	5,807	1995	Red	Blue
0003	248,982	3,326	2003	White	Blue
0005	153,624	4,662	2008	White	Blue
0006	152,628	7,335	2008	White	Blue
0009	849,415	2,701	1994	Blue	None
0499	162,048	1,104	2000	Silver	Blue
1552	181,410	377	2001	Red	None

2255	172,113	719	2002	Garn	Blue
2262	159,151	568	2002	Silver	Red
3264	178,103	659	2003	Red	Blue
3265	176,366	3,426	2003	Red	Blue
3266	136,503	1,229	2003	Red	Blue
3267	182,623	2,230	2003	Red	Blue
4268	160,212	1,171	2004	Black	Blue
6292	200,548	5,077	2006	White	Blue
9216	185,046	5,104	1999	Black	None

7. Provide a copy of your agency/university fuel, maintenance and inspection policy.

The document provided (Exhibit b3) details mileage and day intervals for routine/preventive maintenance for each type of vehicle that the university operates. Procedure No. 8-5, Section IX of the Transportation Policies (Exhibit b1) provides information on expenses incurred associated with gasoline and or mechanical trouble.

See Exhibit b3 and Exhibit b1 for additional information.

8. Describe the logistics of your bulk fuel storage and dispensing facility(ies).

E-10 gasoline is bought in bulk and delivered to the Transportation Services garage facilities. One 15,000 gallon underground storage tank is used for gasoline, with two dispensing pumps. 20% biodiesel is purchased and delivered in bulk to a 4,000 gallon underground storage tank, with one dispensing pump. All pumps are controlled from inside the Transportation garage and are not available except under supervision of Transportation staff.

9. What method of payment is used by employees who purchase fuel?

When a university vehicle is outside of the DeKalb area and it is impossible to obtain the necessary gasoline, oil, and services at the university garage, the driver should use the Wright Express credit cards.

A. A Wright Express Vehicle Equipment Credit Card is available in each vehicle. It is kept in the glove compartment

B. Oil company credit cards will be issued on an as needed basis. These cards should be used if the Wright Express Credit Card is rejected.

C. Retain all company charge tickets and turn them in to the Transportation Office with the #4 copy of the Request for Transportation upon completion of your trip.

D. On those rare occasions when it is necessary to purchase gasoline with cash, a receipt should be obtained at the time of purchase and submitted for reimbursement at the time the vehicle is returned to Transportation. Transportation department funds will be the source of the reimbursement. This type of reimbursement **should not** be included on your travel voucher.

10. Provide a copy of your agency/university new/used vehicle procurement policy.

The Transportation Manager and Garage Foreman determine when a vehicle has reached the end of its useful life. If such a determination is made, the vehicle is added to the replacement list. When funds are available, Transportation Services either goes out for bid or uses existing CMS vehicle master contracts, depending which is less expensive. For single vehicles purchased as an emergency replacement, Transportation seeks quotes from individual dealers for an appropriate vehicle.

See Exhibit b2 and Exhibit b4 for additional information.

11. How many single vehicles were purchased under the small purchase threshold in FY11? Provide a description of each.

No vehicles purchased in FY11.

12. Provide a copy of your agency/university vehicle disposal policy.

University response was “See #10 above; all vehicles are either traded in on new purchases or surplus to CMS”. The Transportation Manager and Garage Foreman determine when a vehicle has reached the end of its useful life. If such a determination is made, the vehicle is added to the replacement list.

See Exhibit b6 for additional information.

13. What was your agency/university total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles? Provide a description of each.

A. Acquisitions:	\$0.00
B. Repair & Maintenance:	\$330,424.00
C. Insure: commercial	\$55,671.00
D. Fuel:	\$400,093.00

14. Describe any type of GPS or tracking devices that are currently in use on the State-owned vehicles assigned to or owned by your agency/university. Provide a description of the number of vehicles, purpose or use of each vehicle, type of GPS or tracking, etc. for each.

University response was none.

Southern Illinois University at Carbondale

Southern Illinois University at Carbondale responded to the Procurement Policy Board request by providing the following information.

1. How many of each category of vehicles described below are assigned to or owned or leased by your agency/university, statewide?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	93
Trucks up to 1.5 tons	176
Other size trucks	19
Minivans	54
Vans – passenger	25
Vans – other	67
Sport Utility Vehicles (SUV’s)	10
*All other vehicles	34+
*Motorcycles	328
 Total	 806

* The all other vehicles include buses, a tour train, handicapped vans, mobile labs and a Suburban carryall. In addition, there are 328 motorcycles for the Motorcycle Rider Program; a program that teaches area residents motorcycle ridership and safety.

2. How many of each type of vehicle are permanently assigned to individual employees?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	2
Trucks up to 1.5 tons	
Other size trucks	
Minivans	
Vans – passenger	
Vans – other	
Sport Utility Vehicle (SUV’s)	
All other vehicles	
 Total	 2

3. How many and what type of vehicles are assigned to employees as take home vehicles?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	2
Trucks up to 1.5 tons	
Other size trucks	
Minivans	
Vans – passenger	
Vans – other	
Sport Utility Vehicles (SUV’s)	
All other vehicles	

Total

2

4. Provide a copy of your agency/university take home and or personal use policy.

The Travel Service section of the Plant and Service Operations document (Exhibit c1) under Operational Policies, states that University vehicles are to be used EXCLUSIVELY for University business.

See Exhibit c1 for additional information.

5. Provide a copy of your agency/university mileage/maintenance/log in, log out policy.

The Travel Service section of the Plant and Service Operations document (Exhibit c2) under Long and Short-term Vehicle Assignments describes the Preventive Maintenance Schedule in mileage and time intervals.

See Exhibit c2 for additional information.

6. How many vehicles at your agency have 150,000 mile or more? Provide a description of each.

<u>Vehicle #</u>	<u>Year</u>	<u>Make</u>	<u>Body</u>	<u>Model</u>	<u>Current miles</u>
881	1997	Ford	pickup	F-250	330,176
868	2005	FRTL freightliner	grain	NA	307,705
920	1993	Ford	truck	NA	254,533
843	1997	Chev	truck	1500	224,181
445	1996	Ford	pickup	F-250	208,361
524	1987	Ford	truck	Bronco	204,609
580	1996	Dodge	pickup	D-250	200,201
662	1996	Ford	pickup	F-350	196,046
588	1995	Chev	pickup	truck	192,520
431	1990	GMC	pickup	C-1500	192,434
703	1987	Chev	pickup	Fleetside	192,031
711	1992	Ford TV broadcasts	uplink	truck	189,542
564	2006	Ford	sedan	Taurus	184,543
409	2003	Ford mini pickup	MNP/UP	Ranger	182,622
415	1996	Dodge	pickup	D-250	182,320
565	2006	Ford	sedan	Taurus	181,872
579	1999	Ford	pickup	F-250	177,699
089	2005	Dodge mini pass van	MNPvan	Caravan	174,882
730	1992	GMC	grain	truck	174,685
630	2000	Ford passenger van	Pvan	Econoline	173,210
080	2003	GMC passenger van	Pvan	Savana	164,598
519	1996	Ford	pickup	F-150	163,555
451	2001	Dodge	SUV	Durango	155,221
022	2002	Chev hauling van	Hvan	C-2500	155,068
309	1992	Chev	pickup	C-2500	153,735
437	1998	Chev 1 ton dually	Ton truck	C-3500	153,670
449	1996	Dodge mini pass van	MNPvan	Caravan	153,420

See Exhibit c3 for additional information.

7. Provide a copy of your agency/university fuel, maintenance and inspection policy.

The Preventive Maintenance and Safety Inspection information (Exhibit c4) taken from the Travel Service section of the Plant and Service Operations document details maintenance schedules and describes which components are inspected for safety at what intervals. The Fuel Pump Information (Exhibit c5) is also found in the Travel Service section of the Plant and Service Operations document.

See Exhibits c4 and c5 for additional information.

8. Describe the logistics of your bulk fuel storage and dispensing facility(ies).

Fuel is placed out for bid. The vendor with the lowest price for the needed type of fuel is called for delivery. The fuel is delivered by tanker truck (to the on-campus fueling facility). Fuel dispensing facilities are available 24/7 for university vehicles utilizing a special fueling key and ID for SIU-C vehicles.

9. What method of payment is used by employees who purchase fuel?

Fuel purchased for university vehicles at SIU-C's fuel station is obtained using a special fueling key. Fuel may be purchased off-campus by using the Wright Express credit cards.

10. Provide a copy of your agency/university new/used vehicle procurement policy.

The section entitled Purchases between \$5,000-\$99,999.99 which is found in the Travel Service section of the Plant and Service Operations document provides details on the procurement of equipment, commodities and general services (excluding Professional and Artistic Services and Construction) under \$100,000.

See Exhibit c6 for additional information.

11. How many single vehicles were purchased under the small purchase threshold in FY11? Provide a description of each.

The list of Single Vehicle Purchases (Exhibit c7) shows a total of nine vehicles and includes three makes which includes sedans, pickups and a bus.

See Exhibit c7 for additional information.

12. Provide a copy of your agency/university vehicle disposal policy.

The document provided by the University is entitled Southern Illinois University Vehicle Trade Policy and is dated January 1, 1998 (Exhibit c8). It specifies that vehicles will normally be traded only after being driven for 100,000 miles or 10 years in use.

See Exhibit c8 for additional information.

13. What was your agency total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles? Provide a description of each.

The total SIUC expenditure for FY11 was \$3,996,997 (Exhibit c9). It gives a breakdown of acquisitions, body and accident repairs, maintenance and operational expenses.

See Exhibit c9 for additional information.

14. Describe any type of GPS or tracking devices that are currently in use on the State-owned vehicles assigned to or owned by your agency/university. Provide a description of the number of vehicles, purpose or use of each vehicle, type of GPS or tracking, etc. for each.

One GPS device is currently installed on SIU-C vehicle # 570, a 2007 Ford F-350 pickup truck assigned to the university plumbers for their work on campus. Make/Model: GPS Insight, Part # GPSI-3900i.

University of Illinois at Urbana-Champaign

The information provided by the University of Illinois is solely for the Champaign-Urbana campus. Due to time constraints in completing this study, the large volume of vehicle usage and geographical area of three University of Illinois campuses it was determined that providing information from the largest and most central campus would allow the best snapshot of University policy and data. All three campuses operate under the policies and procedures outlined in this section of the Procurement Policy Board study. Due to the size and scope of University of Illinois vehicle usage, the PPB needed follow up requests in addition to the initial request supplied to all three Universities as well as CMS. There continues to be open dialogue with the University of Illinois regarding fleet totals and policy development.

1. How many of each category of vehicles described below are assigned to or owned or leased by your agency/university, statewide?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	175
Trucks up to 1.5 tons	429
Other size trucks	128
Minivans	163
Vans – passenger	18
Vans – other	172
Sport Utility Vehicles (SUV’s)	189
All other vehicles	5
Total	1279

Notes: Pete Varney, Director, F&S Fleet Operations, has recently begun a project to validate these vehicle records with University Property Accounting. He indicates the record keeping prior to his arriving in that office (early 90’s) was not very centralized. His office now retains titles and records for vehicles that he is reasonably certain are no longer owned by the University (a 1974 Ford Pinto at COM-Rockford, for example). However, he is not comfortable removing the file and destroying the title without confirming with the Department, Property Accounting, etc. He estimates there are at least 40 vehicles that are no longer at the University, but they are included in this report. As the clean-up project proceeds, which will likely take several more months, he anticipates additional vehicles will be identified that are no longer at the University.

The above list includes some vehicles that have a status of “inoperative,” which means the University still owns them, but they are not in use. Such vehicles can remain with the University for a year (or more) until traded or disposed of appropriately.

PPB ADDITIONAL INFORMATION REQUEST:

The University made the following points in responding to follow-up questions posed by the PPB:

The University, as a State entity, does not pay for license plates, registrations or liability insurance. State license plates and registrations are permanent.

If the vehicle was disposed of prior to ~1995, it may not have been processed out of the fleet system by F&S resulting in the suspect vehicles that are alluded to in the next question.

Liability insurance is provided by the State and there are no premiums for this.

There is not a breakdown of how many and what types of vehicles are included in the lists that are no longer at the University.

There is not an estimate on approximately how many *additional* vehicles will be identified that are no longer at the University.

There is not a breakdown available of how many and what type of vehicles are currently designated as *inoperative* University-wide. “Inoperative” is primarily used by F&S generally other departments do not report/classify vehicles as inoperative to this office.

2. How many of each type of vehicle are permanently assigned to individual employees?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	6
Trucks up to 1.5 tons	0
Other size trucks	0
Minivans	0
Vans – passenger	0
Vans – other	0
Sport Utility Vehicles (SUV’s)	0
Total	6

3. How many and what type of vehicles are assigned to employees as take home vehicles?

<u>Vehicle type</u>	<u>Number</u>
Passenger cars	2
Trucks up to 1.5 tons	0
Other size trucks	0
Minivans	0
Vans – passenger	0
Vans – other	0
Sport Utility Vehicles (SUV’s)	0
All other vehicles	0
Total	2

4. Provide a copy of your agency/university take home and or personal use policy.

The University provided a specific narrative (Exhibit d1) that states, in part, that personal use of University motor vehicles is prohibited and will not be tolerated.

See Exhibit d1 for additional information.

5. Provide a copy of your agency/university mileage/maintenance log in, log out policy.

The University provided a specific narrative (Exhibit d2) that details the guidelines associated with Fleet Management and the Car Release Order form along with information associated with the purchase of gasoline, oil, service and repairs.

See Exhibit d2 for additional information.

6. How many vehicles at your agency/university have 150,000 miles or more? Provide a description of each.

The University does not maintain this data. Odometer readings are collected with fuel transaction; both on-campus and off-campus (see response to # 9). These odometer readings are recorded by the driver purchasing fuel and are often recorded incorrectly. Additionally, not every University vehicle generates odometer readings. Determining the number of vehicles in excess of 150,000 miles would require a vehicle-by-vehicle review of recent readings in our fleet of nearly 1,300 vehicles.

PPB ADDITIONAL INFORMATION REQUEST:

The University made the following points in responding to follow-up questions posed by the PPB:

There are many triggers for vehicle maintenance including odometer readings and elapsed time. Mileage is only one method. Also, please remember that the University fleet is decentralized. Every University department would have to be contacted in order to identify how they address maintenance issues. A few points to keep in mind:

- Clarification – odometer readings are recorded and stored, but error prone. The number of errors is such that it prevents a simple query from generating the answer to this question and would require hours of manual odometer verification.
- Departments are responsible for maintaining their own vehicles on whatever schedule they set.
- Some departments do log/record mileages separately, they just don't report it to F&S

Many vehicles are driven very short distances, but in use every day around campus. A service vehicle may make 3 service calls on campus and only drive 2 miles per day. These vehicles are better off maintained on a time basis (3, 4 or 6 months for example) than on mileage.

Odometer readings still serve a purpose, but are not reliable enough to allow mass reporting. This is a combined result of human error and system limitations

If the department does not obtain fuel at F&S Garage, or via University issued fleet credit card (Voyager) then there is no data flowing to this office.

The University did provide data regarding their vehicles that currently have in excess of 150,000 miles on the odometer. There are 64 vehicles in excess of 150,000 and the FY11 annual operating costs for these vehicles, including fuel was \$119,974.21.

7. Provide a copy of your agency fuel, maintenance and inspection policy.

The University provided a document (Exhibit d3) that gives guidelines for the annual vehicle maintenance and safety inspections at least once a year regardless of mileage driven or hours utilized.

See Exhibit d3 for additional information.

8. Describe the logistics of your bulk fuel storage and dispensing facility(ies).

The Urbana campus has a maintenance facility equipped with 3 underground fuel storage tanks (UST's) and one aboveground storage tank. The UST's have a capacity of 12,000 gallons each and provide unleaded fuel (2 UST's) and biodiesel (1 UST) to any University or other State-owned vehicle. The above ground tank stores up to 2,000 gallons of E85. This site dispensed approximately 272,000 gallons of unleaded, 92,000 gallons of biodiesel and 26,000 gallons of E85 in fiscal year 2012.

9. What method of payment is used by employees who purchase fuel?

Fuel is available at the Urbana Garage and the department may choose to obtain fuel there or commercially. All vehicles may have a credit card if requested for the purchase of fuel. No department is required to have vehicles fueled or serviced at University garages. They are permitted to seek fuel/service elsewhere.

Each vehicle has an associated University account number. If requested by the owning department, each vehicle may also be provided with a Voyager fleet fuel card. Fuel dispensed by the Urbana campus maintenance facility is charged directly against the account for the vehicle receiving the fuel. The Voyager card is used by vehicles needing fuel when operating outside the Urbana area. These fuel charges are also charged directly against the vehicle's account number.

PPB ADDITIONAL INFORMATION REQUEST:

The University made the following points in responding to follow-up questions posed by the PPB:

Excerpt from the "Use of University Vehicles" policy:

"When a motor vehicle is operated outside a city serviced by a campus car pool office, the credit card furnished with the motor vehicle should be used for the purchase of:

Gasoline, oil and lubrication service;

Tire and battery service;

Vehicle washing on extended trips; and,

Cost of repairs under \$50.

Copies of all credit receipts must be given to the appropriate campus car pool office. The campus car pool office will reimburse necessary cash purchases, if a receipt is submitted.

For emergency repairs more than \$50, call the appropriate campus car pool office to find out what should be done. If the campus car pool office is closed, call the University Police for guidance. Campus car pool offices and the University Police will accept Collect Calls if necessary."

All University vehicles may (at the department's request) obtain a fleet fueling credit card (currently Voyager). This card may be used to obtain fuel at commercial gas stations. The card is associated with a specific vehicle, which funds the purchase. Each credit card has a limit of 3

transactions per 24 hour period or \$1,000 per month and is adjusted if necessary on a per card basis. Fuel is a prohibited P-card purchase.

10. Provide a copy of your agency/university new/used vehicle procurement policy.

The University provided a list of general rules (Exhibit d4) for vehicle replacement that is divided into categories of vehicle types and the associated time for scheduled replacement by miles driven and years in service.

See Exhibit d4 for additional information.

11. How many single vehicles were purchased under the small purchase threshold in FY11? Provide a description of each.

The following list of vehicles that were all below the bid limit were purchased by departments with assistance from the Director of F&S Fleet Operations in obtaining competitive quotes.

<u>Unit</u>	<u>Vehicle</u>
II St Geo Surv	Ford F-250 truck
Truck Pool	Ford pickup truck
Truck Pool	Ford commercial cutaway truck
II Nat His Surv	Ford F-150 truck
II Nat Hist Surv	Ford pickup
IGB	F-150 SC 4X4 pickup truck
Agronomy	GMC pickup truck
II Nat Hist Surv	Ford pickup
Car Pool	Toyota sedan
Car Pool	Toyota sedan
Camus Recreation	Ford pickup
Police	Ford sedan
Agronomy	Ford pickup truck
Env Hlth & Saft	Ford S-DTY F550 pickup truck
Car Pool	Ford E250 Super cargo van
ITARP	Ford E250 Super cargo van
II Nat Hist Surv	Chevrolet Suburban SUV 4X4
Anthropology	Ford F-150 pickup truck
Crop Scu	Ford pickup truck
Car Pool	Ford carryall/4WD
Anthropology	Ford F150 pickup truck
Cites	Ford Econoline Cargo van
II Nat Hist Surv	Ford F150 Crew cab 4X4 SS
Sch of Chem	Ford pickup
II Nat Hist Surv	Ford F250 Crew cab 4X4 SRW
Car Pool	GMC Sierra 1500 pickup truck

PPB ADDITIONAL INFORMATION REQUEST:

The University did not respond to the following question: Of the departments that *chose to obtain their own quotes*, is there a list of single vehicles purchased under the small purchase threshold?

The University made the following points in responding to follow-up questions posed by the PPB:

There is not a written procedure on obtaining competitive quotes for vehicles under the bid limit.

The name of the awarded vendor for each of the vehicles purchased below the small purchase threshold is available for only those vehicles purchased with F & S involvement

See Exhibit d8 for additional information.

12. Provide a copy of your agency/university vehicle disposal policy.

The University provided a copy of the rules that apply to the disposal of State-owned vehicles except those traded in to a dealer for replacement vehicles and those vehicles under the jurisdiction of State colleges and universities.

See Exhibit d5 for more information.

13. What was your agency/university total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles? Provide a description of each.

Total for Repair and Maintenance: \$1,848,061.16

This is a total of \$414,014 (paid by units other than Transportation & Automotive Services unit at Facilities and Services to outside vendors*) plus \$1,434,046 in goods and services for maintenance provided by the Transportation & Automotive Services unit in Facilities and Services.

*This is a summary of expenditures for FY11 the Urbana-Champaign campus outside of F&S in the following account code categories: Operations of Automotive Equipment; Gas/Oil/Antifreeze; Automotive Parts/Fittings; Automotive Repair/Maintenance; Other Automotive Expenses; Automotive Services Not Elsewhere Classified.

Total for Acquisitions: \$1,186,382.32

See detailed list below.

FY11 Vehicle Purchases

<u>PO Number</u>	<u>Vehicle type</u>	<u>Expenditure</u>
PO493269	truck	\$13,400.00
PO486820	truck	\$26,675.00
PO486816	truck	\$44,320.00
PO474732	van	\$9,300.00
PO470632	truck	\$41,784.00
PO470420	truck	\$51,300.00
PO465253	truck	\$16,900.00
PO462231	truck	\$20,747.00
PO451778	van	\$19,416.00
PO457015	truck	\$37,668.00
PO446841	van	\$23,866.00
PO446865	car	\$36,130.00
PO439203	van	\$34,368.00
I4187977	truck	\$16,011.46

PO428480	car	\$19,233.00
PO422813	van	\$96,830.00
PO408509	truck	\$41,539.00
PO404532	truck	\$27,508.00
PO404679	truck	\$47,490.00
PO402214	van	\$22,850.00
PO396165	car	\$39,798.00
PO383994	truck	\$22,468.00
PO384789	car	\$29,186.00
PO374115	truck	\$12,191.19
Total		\$750,978.65

Bids

<u>PO Number</u>	<u>Vehicle type</u>	<u>Expenditure</u>
PO462070	van	\$43,529.00
PO451360	van	\$142,052.00
PO436991	cars	\$83,920.94
PO415754	van	\$173,592.00
PO415661	truck	\$82,875.00
PO410100	cars	\$80,771.18
PO410011	SUV	\$58,260.00
PO394580	dump	\$317,525.00
PO372070	cars	\$66,402.20
1CCZ1107	truck	\$88,900.00
1SJC1102	truck	\$48,615.00
Total		\$1,186,382.32
Grand Total		\$1,937,360.97

PPB ADDITIONAL INFORMATION REQUEST:

The University made the following points in responding to follow-up questions posed by the PPB:

Initially the University stated that the total for acquisitions in FY11 was \$1,186,382.32. With that total they provided a list of *FY11 vehicle purchases* totaling \$750,978.65 along with a list of *Bids* totaling \$1,186,382.32. In a follow-up question to the University, PPB staff inquired about the discrepancy between the initial total given for FY11 acquisitions (\$1,186,382.32) and the sum of the totals given with the accompanying lists (\$1,937,360.97). The university responded to the follow up question by stating:

“The total for FY11 acquisitions is \$ 1,937,360.97 (sum of \$750,978.65 plus \$1,186,382.32). The wrong number was picked up as the total in the Word document that was initially submitted.”

“FY11 Vehicle purchases” means vehicles purchased that were below the bid limit – these are purchases that were made as needs arose over the year. Typically quotes are sought, but no formal bid is done. The only exception is the van for \$96,830 that was purchased off the State contract. Since the contract was in place, the Urbana Purchasing Office did not have to do a bid for that

vehicle. The vehicles listed in the “bids” section are those that were procured following a bid solicitation by the Urbana Purchasing Office.

14. Describe any type of GPS or tracking devices that are currently in use on the State-owned vehicles assigned to or owned by your agency/university. Provide a description of the number of vehicles, purpose or use of each vehicle, type of GPS or tracking, etc. for each.

Facilities and Services has installed GPS devices on 114 vehicles. These vehicles provide maintenance and services activities throughout the campus. The vehicles are used by a wide range of crafts and trades (carpenters, pipefitters, electricians, etc.). The GPS units track vehicle location and driver. F & S supervisors have the ability to locate and review the location of these GPS equipped vehicles. A number of local areas, such as the UIECU and local restaurants, are marked and if a GPS equipped vehicle enters one of these areas an email is automatically sent to F&S supervision.

Note: Along with the University’s responses to the PPB survey questions, a document entitled Business and Financial Policies and Procedures Section 15.3 – Use of University Motor Vehicles was provided.

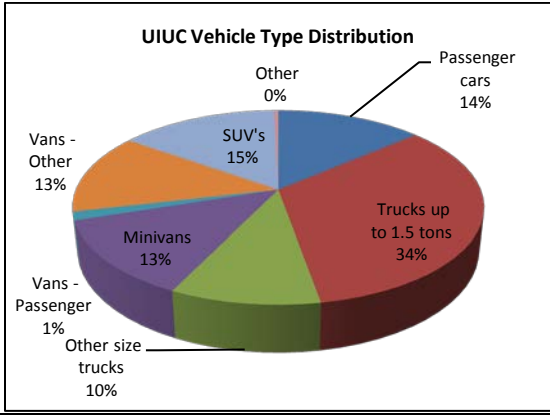
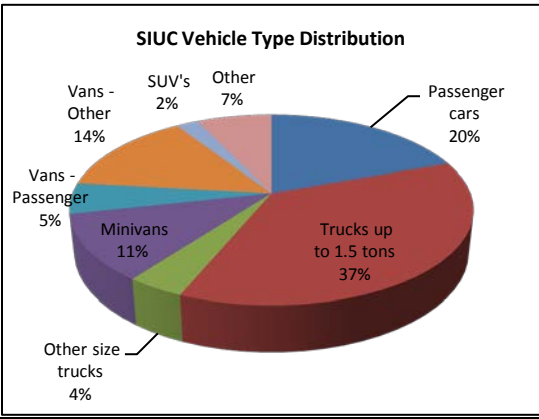
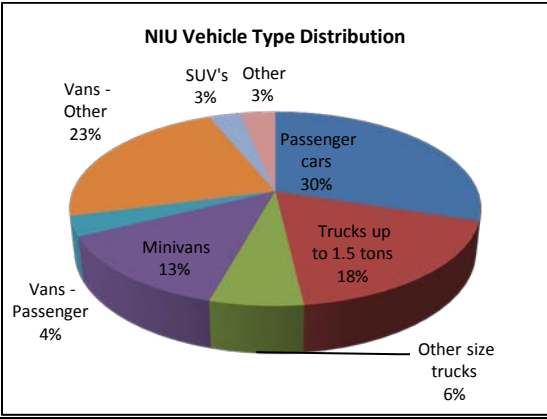
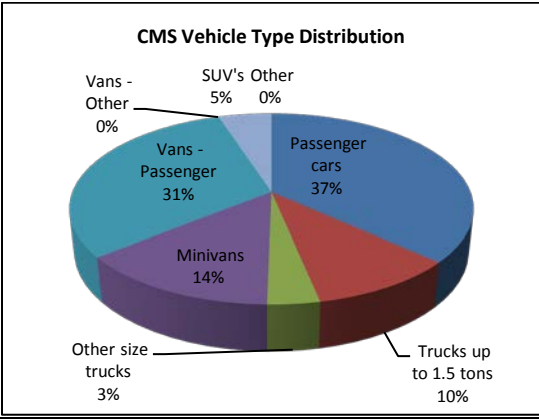
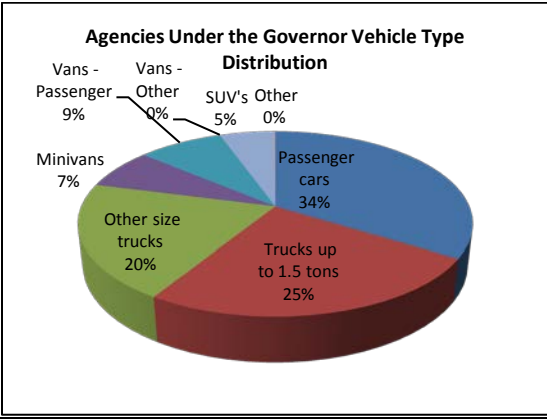
See Exhibit d6 for additional information.

MAJOR CONCLUSIONS

The following information offers a comparative summarization of the responses from each entity that is included in the study.

AGENCY/UNIVERSITY-OWNED VEHICLES

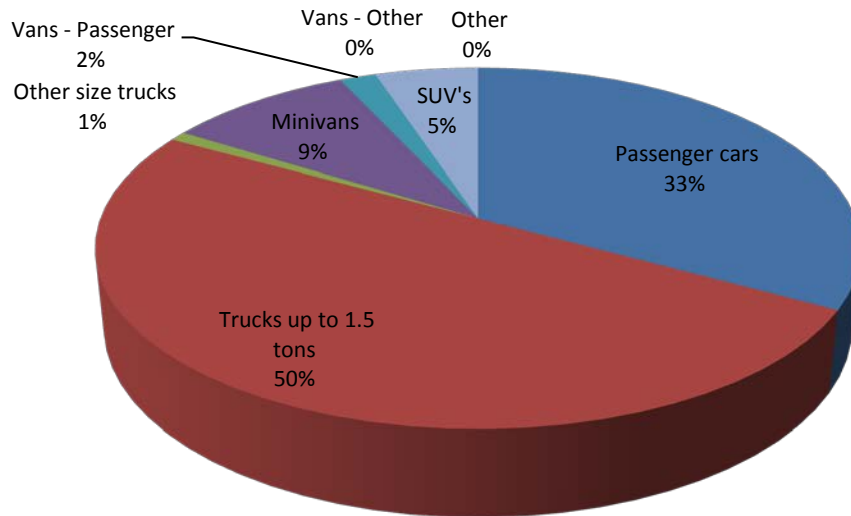
	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Passenger cars	4,117	124	72	93	175
Trucks up to 1.5 tons	3,038	34	44	176	429
Other size trucks	2,461	12	15	19	128
Minivans	869	47	32	54	163
Vans - Passenger	1,014	104	8	25	18
Vans - Other	-	-	55	67	172
SUV's	649	17	7	10	189
Other	14	-	8	34	5
Total	12,162	338	241	478	1,279



VEHICLES PERMANENTLY ASSIGNED TO INDIVIDUAL EMPLOYEES

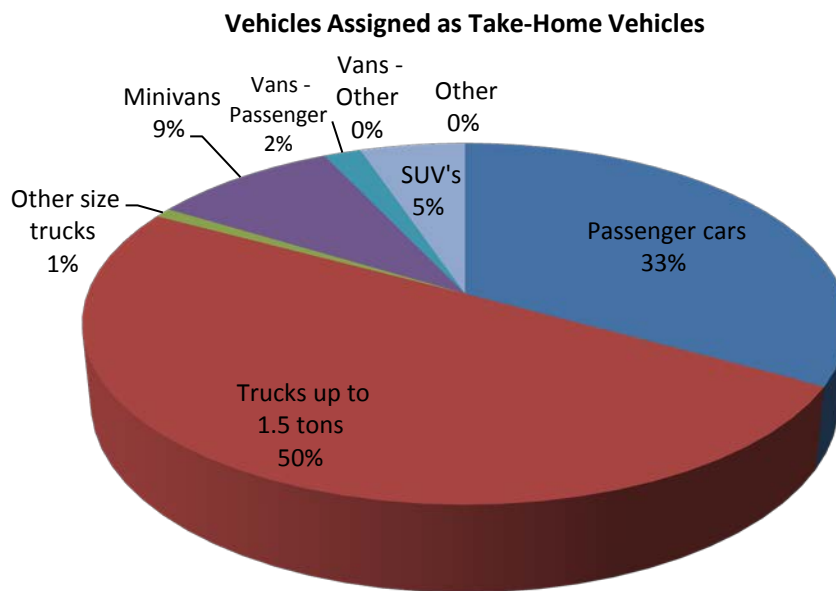
	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Passenger cars	700	1	2	2	6
Trucks up to 1.5 tons	1,078	-	-	-	-
Other size trucks	18	-	-	-	-
Minivans	199	-	-	-	-
Vans - Passenger	39	-	-	-	-
Vans - Other	-	-	-	-	-
SUV's	110	-	-	-	-
Other	-	-	-	-	-
Total	2,144	1	2	2	6

Vehicles Permanently Assigned to Individual Employees



VEHICLES ASSIGNED AS TAKE-HOME VEHICLES

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Passenger cars	692	1	2	2	2
Trucks up to 1.5 tons	1,053	-	-	-	-
Other size trucks	18	-	-	-	-
Minivans	195	-	-	-	-
Vans - Passenger	39	-	-	-	-
Vans - Other	-	-	-	-	-
SUV's	110	-	-	-	-
Other	-	-	-	-	-
Total	2,107	1	2	2	2



TAKE-HOME AND/OR PERSONAL USE POLICY

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Personal Use Policy	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Take Home Policy					
1. Vehicle is specially equipped to perform law enforcement services and the law enforcement employee is on call 24 hours a day.	Yes	Yes	Not Specified	Not Specified	Not Specified
2. Employee's work assignment requires traveling to numerous locations over a considerable territory with infrequent stops at the employee's headquarters.	Yes	Yes	Not Specified	Not Specified	Not Specified
3. Employee is a State official confirmed by the State Senate or acting in the capacity of such a State official.	Yes	Yes	Not Specified	Not Specified	Not Specified
4. Employee is regularly subject to special or emergency calls from his/her residence during non-duty hours.	Yes	Yes	Not Specified	Not Specified	Not Specified
5. Criteria to be met to be assigned a take-home vehicle:	Yes	Yes	Not Specified	Not Specified	Not Specified
a. Vehicles may not be assigned as a form of compensation, as a benefit, or based solely on an employee's title.	Yes	Yes	Not Specified	Not Specified	Not Specified
b. Vehicles may be assigned based on justification of use and only if the assignments are in the State's best interests. Relevant factors include (i) fuel costs, (ii) miles driven per year for State business, (iii) the need of the employee to respond to emergencies and/or utilize specialized equipment or vehicle types in connection with his or her State job duties.	Yes	Yes	Not Specified	Not Specified	Not Specified
c. Employee must be in compliance with all Tax Rules and Laws.	Yes	Yes	Not Specified	Not Specified	Not Specified
d. Employee must be in compliance with Insurance Requirements.	Yes	Yes	Not Specified	Not Specified	Not Specified

MILEAGE/MAINTENANCE LOG-IN/LOG-OUT POLICY

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
1. Database maintained that includes date, mileage, driver name, equipment number, license plate and division.	Yes	Yes	Yes	Yes	Does Not Track Mileage On All Vehicles*

* UIUC tracks mileage for all fleet vehicles maintained by F & S.

2. Agency/University administered requirements and recommendations for oil change and scheduled maintenance as a cost saving step due to the extended life cycles of lubricants and technology.	Yes	Yes	Yes	Yes	Yes
3. Annual maintenance inspections to ensure safety, efficiency.	Yes	Yes	Yes	Yes	Yes
4. Passenger vehicles may be assigned to an employee for a specific trip on a long-term or permanent basis, with authorized funding, written justification, and unit approval.	Yes	Yes	Yes	Yes	Yes

VEHICLES WITH 150,000 MILES OR MORE

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
How many vehicles at your agency/university have 150,000 miles or more?	5,829	304	16	27	64

FUEL, MAINTENANCE AND INSPECTION POLICY

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
1. Purchases of fuel, oil, and related items for the operation of State-owned equipment must be made from the most economical source.	Yes	Yes	Yes	Yes	Not Specified
2. Employees are required to use E-85 (85% ethanol) and bio-diesel when operating flexible fueled and diesel powered vehicles in the State fleet, whenever practical.	Yes	Yes	Not Specified	Not Specified	Not Specified
3. If a State-owned garage or State-owned service station is not conveniently located, an appropriately located privately operated station with a self-service island shall be the source of purchase	Yes	Yes	Yes	Not Specified	Not Specified

BULK FUEL STORAGE AND DISPENSING FACILITIES

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
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1. Agency/University maintains a bulk fuel supply to be utilized by employees using vehicles for official business.	Yes	Yes	Yes	Yes	Yes
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METHOD OF PAYMENT USED BY EMPLOYEES TO PURCHASE FUEL

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
1. When a vehicle is outside of the area and it is impossible to obtain the necessary gasoline, oil, and services at the agency/university garage, the driver should use the provided credit cards.	Yes	Yes	Yes	Yes	Yes
2. Agency/University employee may choose to obtain fuel commercially.	Yes	Yes	Yes	Yes	Yes

NEW/USED VEHICLE PROCUREMENT POLICY

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
1. Maintains database with number of active or inactive vehicles in the fleet.	Yes	Yes	Yes	Not Specified	No*
2. Mandated vehicle replacement guidelines in place.	Yes	Yes	Yes	Yes	Yes
3. Used small purchase acquisition to obtain a single vehicle in FY11.	No	No	No	Yes	Yes
4. Utilizes State's Master Contract to obtain vehicles.	Yes	Yes	No	No	No

*UIUC - University staff stated there could be more than 40 vehicles included in the report provided to the Board staff that, "really don't exist." A clean up project is in progress that will identify additional vehicles that no longer exist.

VEHICLES PURCHASED UNDER THE SMALL PURCHASE THRESHOLD IN FY2011

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Number of vehicles purchased under the small purchase threshold in FY11	0	0	0	9	26*

*UIUC - The 26 vehicles provided were purchased with the assistance of the Director of F&S Fleet Operation. Additionally there are 2 leased motorcycles used by the University Police.

VEHICLE DISPOSAL POLICY

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
1. Replacement guidelines for passenger vehicles 15,000 miles and/or 8 years. Light duty trucks threshold is 175,000 and or 6 years. Also must consider cost efficiency and safety	Yes	Yes	Not Specified	Not Specified	Not Specified
2. Transportation/Garage officials determine when a vehicle has reached the end of its useful life. Vehicle then added to replacement list at the time the vehicle is returned to Transportation facility.	Not Specified	Not Specified	Yes	Not Specified	Not Specified
3. Property Control Department must be contacted when a department wishes to have assigned equipment "Surplused and removed from inventory". All vehicles are either traded in on new vehicles or surplused to CMS.	Not Specified	Not Specified	Yes	Not Specified	Not Specified
4. Vehicles will normally be traded in only after being driven for 100,000 miles or after 10 years in use.	Not Specified	Not Specified	Not Specified	Yes	Not Specified
5. Vehicles which continue to be safe and economical to maintain will be kept in service longer than 100,000 miles or 10 years.	Yes	Yes	Not Specified	Yes	Not Specified
6. Vehicles purchased and used as police cruisers will normally be traded after 75,000 miles or 2 years in use.	Not Specified	Not Specified	Not Specified	Yes	Not Specified
7. Vehicles are traded in on new purchases as allowed by State law.	Not Specified	Not Specified	Not Specified	Not Specified	Yes

TOTAL FY2011 EXPENDITURE TO ACQUIRE, REPAIR, MAINTAIN AND OPERATE STATE-OWNED VEHICLES

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
Total FY11 expenditure to acquire, repair, maintain and operate State-owned vehicles.	\$102,100,000	\$29,400,000*	\$786,188	\$3,996,997	\$3,785,422

* CMS revolves and bills agencies for \$23.1 million in repair, maintenance and fuel. Also, this reflects \$300,000 in CMS vehicle purchases that other agencies then paid CMS for.

GPS OR TRACKING DEVICES IN USE

	Agencies Under the Governor	CMS	NIU	SIUC	UIUC
GPS or Tracking Devices	None	None	None	one vehicle*	114 vehicles**

* One GPS device is installed on a 2007 Ford F-350 pickup truck assigned to the university plumbers for their work on campus.

** Facilities and Services has installed GPS devices on vehicles that provide maintenance and services activities throughout campus. These GPS equipped vehicles are used by a wide range of crafts and trades (carpenters, pipefitters, electricians, etc.).

CONCLUSIONS

Based on the responses from each entity that was included in this study, it is clear that there are a wide range of approaches to the policies and procedures that govern the use of State-owned vehicles. In addition to the varied approaches to the management of State-owned vehicles, there also appears to be a significant variation in the data management for individual State-owned vehicles.

One constant that is evident in the documents provided by each entity is the explicit prohibition of personal use of any State-owned vehicle. While there is the potential for abuse of the privilege of using a State-owned vehicle, the results of the study would indicate that abuse is not viewed as a major concern by the entities as there is a very small percentage of State-owned vehicles equipped with any type of GPS tracking device. It is interesting to note that the entities that have the largest number of take home vehicles do not have any GPS tracking devices. However, the response from CMS pointed out that “CMS does not own any GPS or other tracking devices on its agency fleet vehicles. CMS plans to initiate a study of this per the OAG Audit of Fleet and per [20 ILCS 405/405-280] was [20 ILCS 405/67.15] which was recently enacted”.

With respect to policies that govern take home vehicles, the supporting documents provided by the entities in this study contained varying degrees of specificity. Each entity clearly states in writing that State/University owned vehicles are for official business use only. However, some entities are more precise in that they provide examples of what is considered *unauthorized* use. Due to significant liability issues and in the interest of good stewardship of State resources it is beneficial to have specific guidelines spelled out to address take home vehicles.

The number of vehicles owned by the State of Illinois is significant. As evidenced by the information provided by CMS and the Universities, acquisition costs are staggering. Operating and maintaining a large fleet depends heavily on feedback from the drivers regarding the operation and road worthiness of individual vehicles. Routine and preventive maintenance is essential in the mission to manage costs in the most efficient manner possible. Generally, odometer readings assist in acting as trigger mechanisms to perform routine vehicle maintenance. While one University does not track odometer data in a centralized fashion, all entities should insist on accurate and timely feedback from drivers, including odometer readings, in order to efficiently manage their State-owned vehicle fleet. The feedback data from drivers should be recorded and maintained by all entities in order to accomplish the goal of safe and efficient management of the State-owned fleet.

There are a couple of observations that are worth noting with regard to fuel consumption and fuel accessibility. CMS and IDOT have dozens of fueling sites across the state. Additionally, each University that is included in the study has access to a bulk fuel facility on or near their campus. A consideration should be given to the prospect of a cooperative agreement between Universities and CMS and or IDOT which would allow access to fuel sites for any State-owned vehicle irrespective of their home base assignment. This would offer a degree of convenience and would also eliminate the need for drivers to purchase fuel from retail sites when they are, for example, a significant distance from their home campus. Likewise, in certain situations, it would be convenient for CMS drivers to have the option of accessibility to university campus fueling sites across the state.

Taking the fuel discussion a bit further, it would also be prudent to explore the possibility of Universities and CMS to enter into a cooperative agreement with regard to the bulk purchase of fuel. The possible scenario of one tanker truck passing by several CMS fuel sites to make a delivery at a university campus seems inefficient.

Of the agencies and universities included in the study, it should be noted that only two universities opted to use the small purchase threshold to make vehicle purchases. Perhaps a potential alternative to individual entities making individual small purchases would be the prospect of a cooperative agreement between agencies and universities for vehicle acquisitions. Obviously end user need is a factor in the timing of vehicle purchases. However, information sharing, planning and forecasting with other entities would be vital to the success of this type of cooperative purchase agreement.

A good example of a cooperative effort is how the CMS Division of Vehicles (CMS-DOV) now purchases vehicles for most agencies under the Governor (with the exception of IDOT and the ISP). When CMS-DOV purchases a vehicle on behalf of an agency, the receiving agency is charged a monthly usage fee, which will ultimately pay off the car after four years, for example. The benefit to the agency is that it reduces their financial burden and improves their cash flow. The benefit to CMS is that it provides ownership and control of the vehicle. Better said, this scenario allows agencies to focus on their core duties. In turn it allows CMS-DOV to do what they do best and that is function as the transportation experts. Once again the program is the result of a cooperative effort. The agency determines what their operational needs are and then CMS-DOV assists by making the vehicle purchases that can help the agency reduce costs and provide safe, efficient and reliable transportation.

SUPPLEMENTAL CONCLUSIONS

After initial review of this study by the Procurement Policy Board, additional concerns were aired regarding high mileage and high maintenance State-owned vehicles. As a result, more data was requested from the original entities in this study as well as additional selected Universities, statewide. The additional data was examined and compiled by PPB staff and can be found on Exhibit aa1.

One observation that can't be ignored is the fact that a significant number of vehicles in the State-owned fleet have passed their prime. Exhibit aa1 offers an illustration of how many State-owned vehicles have exceeded the 150,000 mile threshold and the associated annual costs to maintain these vehicles. The ever increasing cost to maintain this aged fleet is continuing to place a strain on State and University vehicle maintenance budgets that are already stretched too thin.

Not only can repair and maintenance bills add up quickly for an older vehicle, but fuel efficiency must also be a consideration. The older models are less fuel efficient and thus burn more fuel. This can have a significant effect on budgets and it is an environmental concern as well.

It truly is a balancing dilemma that CMS Division of Vehicles and State Universities are facing. Given the lean budgets that these entities struggle with, they must continually reassess their options and make decisions on whether to continue to try to maintain aging vehicles that have ongoing costly repair bills or whether to replace aging vehicles with newer, more efficient models.

Most entities have been fiscally responsible and diligent in their efforts to make their aging fleets last for much longer than what would be considered the normal useful life of a vehicle. Limited State resources will continue to be a critical challenge for these entities. As such, all State agencies and Universities should continue to monitor their vehicle fleets and react accordingly and responsibly when deciding to maintain older vehicles or replace them with newer models.

Exhibits

Exhibit aa1
CMS/University Vehicles
Over 150,000 Miles
Annual Operating Costs

CMS/University Vehicles Over 150,000 Miles

<u>Entity</u>	<u>Number Of Vehicles</u>	<u>Annual Operating Costs</u>	<u>Average Operating Cost Per Vehicle</u>
Northern Illinois University	16	\$80,497.34 (maint.)	\$5,031.08
Southern Illinois University - Carbondale	27	\$18,018.00 (maint.)	\$ 667.33
Southern Illinois University – Edwardsville**	4	\$ 2,001.00 (maint.)	\$ 500.25
Southern Illinois University - School of Medicine	0	\$0	\$0
Northeastern Illinois University	0	\$0	\$0
Governors State University	0	\$0	\$0
University of Illinois – Urbana/Champaign	64	\$119,974.21 (fuel & maint.)	\$1,874.60
Illinois State University*	14	\$13,101.00 (maint.)	\$935.79
Eastern Illinois University*	15	\$19,580.80 (maint.)	\$1,305.39
Western Illinois University**	33	\$101,255.64 (fuel & maint.)	\$3,068.35
Chicago State University	0	\$0	\$0
Central Management Services*	2491	\$9,301,640.34 (maint.)	\$3,734.10

*Illinois State University, Eastern Illinois University and Central Management Services provided FY12 data

**Southern Illinois University – Edwardsville and Western Illinois University provided CY12 data

Exhibit a1
CMS Policy Regarding Individual
Assignment of State Vehicles



STATE OF ILLINOIS
OFFICE OF THE GOVERNOR
SPRINGFIELD, ILLINOIS 62706

Pat Quinn
GOVERNOR

POLICY REGARDING INDIVIDUAL ASSIGNMENT OF STATE VEHICLES
(April 12, 2010)

1. **Approval of Vehicle Assignment** – Individual assignment of a State vehicle to a State employee may be approved by an agency head if it meets the requirements outlined in 44 Ill. Adm. Code 5040.340 (Assignment to Individuals), attached hereto. Pursuant to 44 Ill. Adm. Code 4050.340, agencies are required to provide complete and accurate annual reports to the Department of Central Management Services regarding individually assigned vehicles and are required to provide timely updates and justifications, no later than 30 days after an occurrence, regarding any changes in the individual assignment of vehicles, including any new, terminated, or transferred assignments.
2. **Relevant Considerations** – In addition to 44 Ill. Adm. Code 5040.340, the following considerations shall apply when determining whether an employee may be assigned a State vehicle:
 - a. Vehicles may not be assigned as a form of compensation, as a benefit, or based solely on an employee's title. Vehicles may be assigned based on justification of use and only if the assignments are in the State's best interests, as set forth below.
 - b. The determination of whether the assignment of a State vehicle to a State employee is in the best interests of the State shall be based on an analysis of relevant factors, including, but not limited to, (i) fuel costs, (ii) miles driven per year for State business and commuting purposes, and (iii) the need of the employee to respond to emergencies and/or to utilize specialized equipment or vehicle types in connection with his or her State job duties.
 - c. As a general matter, unless it is in the best interests of the State, commuting miles should not exceed 30% of miles driven. Commuting miles over 30% of total annual miles should be carefully evaluated by agency heads. Agency heads must ensure that the vehicle assignment is the best option for the State as a matter of transportation efficiency and economy. Agencies should be

prepared to provide justification for assignments where the 30% guideline is exceeded.

d. Certain vehicle uses, including, but not limited to, those listed below, may qualify an employee for an individually assigned vehicle, subject to agency head approval and when other criteria noted above apply:

- i. Construction/Road Clearing
- ii. Emergency Services
- iii. Inspection/Regulatory
- iv. Law Enforcement
- v. Maintenance/Repair
- vi. Technical Support
- vii. Traffic Safety
- viii. Training
- ix. Field/ Territory Responsibilities (e.g., outreach personnel who do significant travel, a meat/poultry inspector from IL Dept. of Agriculture)
- x. Management Program (i.e., individuals who supervise employees that work in the field or a territory and are required to regularly travel to perform such supervision)

3. **Applicability of Authorized Uses** – Driver employees who are individually assigned a State vehicle remain subject to and limited by the authorized uses outlined in 44 Ill. Adm. Code 5040.350 (Authorized Use), attached hereto.

4. **Compliance with Tax Rules and Laws** – Agency fiscal officers (usually an agency's Chief Financial Officer), along with the driver employees who have been individually assigned a vehicle, are responsible for ensuring that employees approved for individually assigned vehicles are in compliance with all applicable rules and laws relating to taxable fringe benefits. In general, any personal use by employees of individually assigned vehicles, including commuting use authorized under 44 Ill. Adm. Code 5040.350, is a taxable fringe benefit. The definitions and specific Federal income tax regulations ("Treasury regulations") are in § 1.274-6T(a)(3). Treasury regulation § 1.274-6T(a)(3) applies to individually assigned vehicles, and prohibits all personal use of those vehicles other than commuting and de minimis personal use. The Department of Revenue, Legal Services Division, is available at 217-782-7055 to assist with any questions relating to taxes.

5. **Commuting as Taxable Fringe Benefit Under Federal Tax Law** – Specifically, as to commutes with individually assigned State vehicles, per Federal Treasury regulation § 1.61-21(f)(3) and, to the extent not already implemented by an agency, retroactive to January 1, 2010, an agency will include in the assigned driver's gross income as a taxable fringe benefit \$1.50 per commute for each work day (\$3.00 for a round-trip) the vehicle is used, regardless of work location or headquarters. Commutes will be included on a monthly Vehicle Log submitted by each assigned driver

to each agency's designated recipient and collector of the Logs. The applicable commuting taxable fringe benefit, required by Federal tax law, will be included by the agency in each affected employee's gross income at least annually, but as frequently as each pay period, and will be included as part of each employee's yearly W-2. Employees' failure to report their commuting properly can result in additional amounts included in their income. This taxable fringe benefit and the \$1.50 per commute gross income do not apply to qualified nonpersonal use vehicles as defined in Treasury regulation § 1.274-5T(k).

6. **Compliance with Insurance Requirements** – Agencies and driver employees are responsible for ensuring compliance with the insurance requirements for individually assigned vehicles per 625 ILCS 5/Ch. 7 Article VI. Mandatory Insurance, Section c. and to carry liability coverage extending to the employees when the assigned vehicles are used for other than official State business or to file a bond in lieu of such liability insurance. Annual certification in this regard is required between July 1 and July 31 of each year or within 30 days of a new vehicle assignment.

Section 5040.340 Assignment to Individuals

Vehicles may be assigned to specific individuals if authorized in writing by the head of the agency to which the vehicle is assigned. Agencies will be required to report to DCMS annually and when changes occur the name of each employee assigned a vehicle, the equipment number and license plate number of the assigned vehicle, employee's headquarters, and residence. Such authorization is to be granted only if one or more of the following conditions are met:

- a) The vehicle is specially equipped to perform law enforcement services and the law enforcement employee is on call 24 hours a day.
- b) The employee's work assignment requires traveling to numerous locations over a considerable territory with infrequent stops at the employee's headquarters as defined in the regulations concerning State employee travel.
- c) When the employee is a State official confirmed by the State Senate or acting in the capacity of such a State official.
- d) When the employee is regularly subject to special or emergency calls from his/her residence during non-duty hours.
- e) Vehicles usage will be in accordance with the provisions of Section 5040.270 (b) of this Part.

(Source: Amended at 7 Ill. Reg. 2483, effective March 1, 1983)

Section 5040.350 Authorized Use

- a) State-owned vehicles shall only be used for public purposes and in the best interests of the State. When performing official duties on behalf of the State, authorized uses include:
 - 1) travel between places of State business, places of temporary lodging, places to obtain meals, and/or other locations necessary to perform official duties;
 - 2) travel to/from places to obtain emergency medical assistance or supplies;
 - 3) transport of:
 - A) other State officers or employees who are on official State business;
 - B) consultants or contractors working on behalf of the State;
 - C) commercial firm representatives working with the State;
 - D) wards of the State;
 - E) residents of State facilities or institutions; and
 - F) others as authorized in writing by an agency head;
 - 4) transport of materials, equipment, supplies, tools, parcels, luggage, or other items necessary or required to perform official duties;
 - 5) operation of a State vehicle by a State contractor when required to meet the needs of a State contract and when authorized in writing by an agency head;
 - 6) operation of a State vehicle when on a travel-related assignment (including, but not limited to, pick-up and return of a vehicle and necessary commuting);
 - 7) commuting in an assigned vehicle when one of the conditions set forth in Section 5040.340 of this Part is met and the employee has complied with:
 - A) the certification requirements of Section 7-601 of the Illinois Vehicle Code [625 ILCS 5/7-601]; and

- B) all applicable reporting requirements of the Office of the Comptroller;
 - 8) operation of a specially equipped vehicle where a State official or employee is required to have constant access to the equipment in the vehicle (for purposes of this Section, "specially equipped vehicle" means a vehicle equipped with communications equipment regularly used to transmit over a network of the Emergency Management Agency); and
 - 9) any other use when for public purposes and in the best interests of the State, and authorized in writing by an agency head.
- b) Unauthorized use of a State-owned vehicle includes, but is not limited to:
- 1) transportation for shopping, meals, entertainment, recreation or vacation purposes unrelated to the performance of official State business;
 - 2) transport of any person for any purpose unrelated to official State business;
 - 3) operation of a vehicle beyond the vehicle's rated capability;
 - 4) transport of materials, equipment, supplies, tools, parcels, luggage, or other items unrelated to the performance of official State business;
 - 5) transport of hazardous or dangerous materials such as acids, explosives, weapons, ammunition, or highly flammable materials unless authorized in writing by an agency head or in an emergency;
 - 6) transport of items or equipment that may constitute an obstruction of safe driving or hazard to pedestrians or other vehicles; and
 - 7) any use in violation of applicable statute, rule, or executive order.
- c) Any employee or official using a State vehicle in a manner contrary to this Section shall be personally responsible for and assume the risk of:
- 1) personal injury to the employee/official and to third parties; and
 - 2) damage to the property of the employee/official, the State, and third parties.

- d) Agencies are responsible for establishing written policies and procedures to ensure all vehicle use is in accordance with this Section. In the event of a violation of this Section, the user's agency head:
- 1) is responsible for instituting corrective action, which may include discipline up to and including discharge; and
 - 2) shall require and verify the user has paid the State for each mile or fractional mile of unauthorized use. Payment to the State shall be equal to the amount reimbursed to State employees for the use of personal vehicles (see 80 Ill. Adm. Code 3000.300(f)(2)).
- e) Agencies may establish policies consistent with or more restrictive than the rules set forth in this Section.

(Source: Amended at 25 Ill. Reg. 6221, effective April 17, 2001)

Exhibit a2
CMS Internal Agency
Authorization/Individually Assigned
Vehicles

DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
INTERNAL AGENCY AUTHORIZATION/INDIVIDUALLY ASSIGNED
VEHICLES (IAV's)

In keeping with CMS Rules, 44 Illinois Administrative Code – Part 5040.340 and state fleet policy, vehicles may be assigned to specific individuals if authorized in writing by the head of the agency to which the vehicle is assigned. Assignment should be approved based on the state's best interests, when a vehicle is necessary for state business use and when it is economically efficient to do so and not solely based on title or commuting needs. IAV vehicles should accumulate enough mileage or reach CMS established breakeven miles annually to be economically efficient to maintain. IAV requirements include but are not limited to driver logs, taxable fringe benefit reporting, agency head justification for commuting miles exceeding 30% of total miles and annual agency checks to ensure employee has a valid driver's license and proof of required insurance. Annual external reporting to CMS on assignments by this agency and within 30 days of changes that occur is also required.

Employee Name: _____ Date Assigned: _____

Home Address: _____ Work Headquarters Address: _____

Vehicle Equipment Number: _____ Vehicle License Number (if not covert): _____

Annual Business Miles: _____ Annual Commuting Miles: _____

What is the work reason/justification for this assignment: (Be specific, relate the necessity to this employees work tasks i.e.; employee is an inspector covering the southern half of Illinois and 25 locations, employee carries calibration equipment and reports to headquarters only quarterly. Other justification examples may include extensive business miles, special equipment or cargo, need to transport clients or passengers the majority of the time utilized.)

Authorization certifies this assignment meets the requirements of the Office of the Governor Fleet Policy dated April 12, 2010 and the CMS/JCAR Rule criteria for assignment checked below:

- a) The vehicle is specially equipped to perform law enforcement services and the law enforcement employee is on call 24 hours a day.
- b) The employee's work assignment requires traveling to numerous locations over a considerable territory with infrequent stops at employee headquarters as defined in the regulations concerning State employee travel.
- c) When the employee is a state official confirmed by the State Senate. (Please note: per Governor's Office fleet policy noted above, in the case of assignment to agency heads under the Governor, policy indicates additional work use justification is also needed as a basis for assignment to be authorized.)
- d) When the employee is regularly subject to special or emergency calls from his/her residence during non-duty hours.

- e) Vehicle usage will be in accordance with the provisions of Section 5040.270(b) of this part.

The agency noted above certifies the employee assigned this IAV has been required to review the current IAV policy and related regulations on use of a state vehicle, taxable fringe benefits, logs and insurance. Justification to permit commuting over 30%. _____

Please refer to State Travel Control Board Rules for headquarters designation and other travel related questions. Please refer to the Illinois Department of Revenue, Legal Services Division, ph. 217+782-7055 for Taxable Fringe Benefit questions on requirements and exemptions. Internal agency policy on Individually Assigned Vehicles must be at least as stringent as CMS Fleet Policy.

Agency Chief Financial Officer Signature: _____ Date: _____
Agency Head Approval Signature: _____ Date: _____

Cc: Agency Vehicle Coordinator
Assignee

Exhibit a3
Automotive Cost Report/Vehicle Log

Automotive Cost Report/Vehicle Log

Daily Purchases

Month:

Driver Name:

Equipment Number:

License Plate:

Division:

<u>Outside Purchases</u>				<u>State Facility Purchase</u>		
Gasoline						
Date	Code	Quantity	Amount	Code	Quantity	Amount
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
	1			1		
Total		0	\$0.00		0	\$0.00

- Codes:**
- Gasoline - 1
 - Oil - 2
 - Lubrication - 3
 - Repair Labor - 4
 - Repair Parts - 5
 - Tires - 6
 - Tubes - 7
 - Battery - 8
 - Anti Freeze - 9
 - Miscellaneous - 10

Date/Other	Code	Quantity	Amount	Code	Quantity	Amount
Total		0	\$0.00		0	\$0.00

Date/Other	Code	Quantity	Amount	Code	Quantity	Amount
Total		0	\$0.00		0	\$0.00

Notes:

Beginning Mileage:

Ending Mileage:

Day of Month	Origin, Daily Stops, and Final Destination	Mileage Beginning	Ending Mileage	Daily Mileage	Commuting Mileage	Commuting Trips

1		0	0	0	0
2		0	0	0	0
3		0	0	0	0
4		0	0	0	0
5		0	0	0	0
6		0	0	0	0
7		0	0	0	0
8		0	0	0	0
9		0	0	0	0
10		0	0	0	0
11		0	0	0	0
12		0	0	0	0
13		0	0	0	0
14		0	0	0	0
15		0	0	0	0
16		0	0	0	0
17		0	0	0	0
18		0	0	0	0
19		0	0	0	0
20		0	0	0	0
21		0	0	0	0
22		0	0	0	0
23		0	0	0	0
24		0	0	0	0
25		Page 51 of 168	0	0	0

26			0		0	0	0	0
27			0		0	0	0	0
28			0		0	0	0	0
29			0		0	0	0	0
30			0		0	0	0	0
31			0		0	0	0	0
					0	0	0	0

Please Read the following: I certify that the information contained on the Automotive Cost Report/Vehicle Log is correct and all miles driven for this reporting period were done conducting official State of Illinois business. I certify that I hold a valid driver's license and vehicle liability insurance in at least the minimum amounts as required by law. I have read and understand the responsibilities of the Vehicle Policy and this form.

Signature:

Exhibit a4
CMS Trip Log,
Monthly Automotive Cost Report

**Central Management Services
Trip Log**

Equipment Number _____

License Number _____

Month/Year _____

Approval Signature _____

Date	Driver	Beginning Mileage	Ending Mileage	Number of Passengers	Destination

**Central Management Services
Monthly Automotive Cost Report**

Equipment Number _____

License Number _____

Month/Year _____

Approval Signature _____

Date	Driver	Mileage	Fuel Purchase Gallons	Pump Price Per Gallon	Vehicle Repair Costs
Total Monthly Repair Costs					
Total Monthly Miles					
Total Monthly Fuel Cost					
Average Miles Per Gallon					

Exhibit a5
CMS Maintenance and Lube, Oil and
Filter Interval Policy



MEMORANDUM

TO: Agency Vehicle Coordinators

FROM: Will Walker, Manager, CMS, Division of Vehicles

DATE: July 27, 2011

SUBJECT: Maintenance and Lube, Oil and Filter Change Interval Policy for Passenger Vehicles – **Update**

Central Management Services, Division of Vehicles (DOV) continues to review fleet maintenance requirements and recommendations as a cost saving step and because of the extended life cycles of lubricants and technology. The standard lube, oil and filter change interval for passenger fleet vehicles 2002 and older is now 3,000 miles or 6 months, whichever comes first. The recommended interval policy for passenger fleet vehicles, model years 2003 and newer, is now 5,000 miles or 6 months, whichever comes first. This same standard applies to vehicles with on-board oil change indicator systems which are reliable as long as they are reset at each oil change. As a reminder, there is also a mandate for state vehicles to utilize re-refined oil which is available at state garages.

Tire rotation is also recommended every 2nd oil change.

This change in policy is effective immediately. Agencies may set internal standards for oil change intervals equal to or more stringent than this standard. Vehicle use should also be a consideration in determining oil change intervals, particularly for severe duty vehicles.

Annual inspections, six-month truck inspections, or your agency's prescribed preventive maintenance inspections, as approved by CMS, all ensure safety, efficiency and compliance with JCAR rules and laws and are required. The benefits derived from regularly scheduled maintenance and preventative maintenance include; better fuel economy, lower fleet operating costs, reduced vehicle downtime and conservation of finite resources.

If we can assist you with other vehicle needs or maintenance questions please do not hesitate to contact the DOV office and thank you for your continued cooperation.

WW: bb

cc: DOV Managers, Shop Supervisors, DOV employees, File

Exhibit a6
CMS Policy on How To Acquire a State
Fleet Vehicle

HOW TO ACQUIRE A STATE FLEET VEHICLE JANUARY 2012

An important element to maintain a cost efficient fleet is timely replacement of vehicles before maintenance costs are prohibitive. The Vehicles Services program mission is to support state agencies in obtaining, maintaining and operating state fleet vehicles safely, economically and efficiently. Additionally, we will operate in an environmentally friendly ways and provide sustainable transportation solutions. Our friendly, knowledgeable and professional staff will help inspire, educate and problem-solve for each agency. One method to monitor the characteristics and size of the State fleet for efficiency is through the vehicle acquisition process.

The CMS Joint Committee on Administrative Rules (JCAR) that apply to vehicle acquisition can be found at the following link:

<http://www.ilga.gov/commission/jcar/admincode/044/044050400B02700R.html>

ROLE OF AGENCY VEHICLE COORDINATOR

Agency Vehicle Coordinators act as the primary liaison with Central Management Services' Division of Vehicles in matters relating to vehicles including but not limited to acquisition, maintenance, and administration. For this reason, it is the Vehicle Coordinator's responsibility to submit all paperwork related to the acquisition of vehicles.

AGENCY FLEET REQUEST (AFR) TEMPLATE

For all vehicle acquisitions, the AFR template determines the most cost efficient option available.

Agencies' desiring to obtain a vehicle submit an AFR to the Division of Vehicles, which can be accessed via

<https://cms.portal.illinois.gov/DOV/vc/Agency%20Fleet%20Request/Forms/AllItems.aspx>

Please provide detailed information for vehicle use and type, and indicate the agency fund number for the vehicle being acquired. To determine cost efficiency all fields in Step 1 must be completed. For fleet cost efficiency, the following options are evaluated in the AFR:

Employee reimbursement,
Maintain current vehicle,
Finance,
New vehicle purchase,
Used surplus vehicle and/or GSA vehicle purchase,
Annual lease

- In compliance with the Governor's Office Cost Cutting Measures of 2009, generate a Procurement Business Case (PBC) when acquiring equipment which includes vehicle acquisitions.
- New Vehicle Purchases – Central Management Services' Procurement Services Division generally secures contracts annually for vehicles available to agencies for purchase or lease, and posts them to the Illinois Procurement Bulletin Board. To obtain information on available vehicle contracts, please visit www.purchase.state.il.us for model year manufacturer cut-off dates, fiscal year end deadlines, etc. New vehicle purchase ordering season is generally **October through May**.
- Specialty (to-be-bid) Vehicle Purchases Agencies can submit an Agency Fleet Request template to purchase specialty vehicles that are not available on contract and an Inter-Governmental Procurement Service (IGPS) requisition allowing the Procurement Services Division Buyer to go out for bid to obtain the specialty vehicle. The deadline for these requests is **March 15 of each year**.

- Used Surplus Vehicle Acquisition – Agency submits an AFR providing information on the vehicle they have located at Surplus. A used vehicle obtained from Surplus Property is one that has been turned in by a state agency, but has some useful life and there is no initial acquisition costs associated with obtaining it. All surplus vehicles acquired require an annual inspection be performed by the state garage to ensure vehicle is roadworthy prior to placing back into the state fleet.
- Used General Services Administration Vehicles (GSA) - Central Management Services' Surplus Property Division recently implemented a program to acquire used GSA vehicles and make them available to state agencies, as an alternative to new purchase. Agency indicates on the AFR the vehicle type needed i.e., mid-size sedan, large sedan, mini-van, truck, etc rather than specifying a particular vehicle manufacturer.
 - a) Central Management Services' Division of Vehicles reviews the Agency Fleet Request template submitted and matches the request to the most economical and available GSA vehicle and provides the agency the vehicle type and cost.
 - b) The review/approval process continues with Vehicles' notifying the agency of the approval
- CMS Leased Vehicles – As funding permits, the Division of Vehicles may purchase vehicles for lease back to agencies. If you plan to pursue leases, please provide notice prior to the budget year vehicles are requested to ensure there is adequate funding in the State Garage Revolving Fund to purchase.

VEHICLE APPROVALS

Division of Vehicles notifies the agency vehicle coordinator when vehicle requests have been approved. The CMS Vehicle Buyer is notified when the approval is for a new vehicle purchase. The CMS Surplus Property Division Manager and staff are notified when the approval is for an agency surplus or used GSA vehicle acquisition.

REPLACEMENT GUIDELINES

- The replacement guideline for passenger vehicles is 150,000 miles and/or 8 years and for light duty trucks it is 175,000 miles and/or 6 years. In all cases, cost efficiency and safety are priorities in vehicle replacement decisions.

TURN-IN OF USED VEHICLES

- Turn used state vehicles in with all keys and a complete property change report to the CMS Property Control Division, 1923 South 11th Street, Springfield, IL 62704. The CMS Property Control Division issues a receipt at the time of vehicle turn in.
- User agency arranges the transfer of special equipment (two-way radios, telephones, etc.,) from the existing unit to the new unit by contacting their agency Telecommunications Coordinator prior to new vehicle pickup
- To request a change in the used vehicle designated for turn in, send a written request for approval to the DOV Manager 20 days prior to receipt of new vehicle.
- Present the Used Vehicle Turn in Receipt, issued by the CMS Property Control Division, to DOV at the time of new vehicle pickup. New vehicles are generally picked up in Springfield, IL, unless the agency has requested the option for a second location, which is in Elgin, or otherwise determined by CMS.

Please contact the CMS - Division of Vehicles' staff for additional information:

Ken.Miller@illinois.gov	Division Manager
Barb.Bonansinga@illinois.gov	Assistant Division Manager
Carl.Spath@illinois.gov	License/Title Section Manager
Brian.Kirkorian@illinois.gov	IT Manager
Jennifer.Walker@illinois.gov	License/Title Section

Exhibit a7
Agency Fleet Request Form

Refer to the **State Employee Business Transportation Policy and Trip Cost Calculator** to determine if transportation needs can be met through short term options of reimbursement, car sharing or car rental rather than through the acquisition or lease using the Agency Fleet Request template.

[State Employee Business Transportation Policy and Calculator](#)

Instructions for completing Agency Fleet Request Form.

All resources needed to perform research on vehicle data are contained within this document in the form of links. All vehicle purchases require an approved PBC prior to completing this request form. Six steps are required to complete the request for a new vehicle with each step color coded to match the corresponding area. ***A response is required in all fields for each step. Incomplete AFR's will be returned to the agency. Detailed instructions for completing this template are located on the last page (6) of this document.***

STEP 1 – Calculator-Complete the cost calculator to view the most cost-efficient solution to vehicle acquisition.(For vehicles weighing over 8,999 GVWR provide annual miles then proceed to [STEP 2](#)).

STEP 2 – Form-Complete the form with all required information, links are contained within this form to look up detailed data.

STEP 3 – Exception Letter-If all vehicle regulations are not met, the exception letter must be filled out.

STEP 4 – Enter turn-in vehicles into the table labeled Step 4.

STEP 5 – A print button is located at the bottom of the document. Please print out the form and acquire the appropriate signature. The form can be saved as a word document for your record, or you will have a record in your sent box once submitted.

STEP 6 – A submit button is also located at the bottom of the document. Please click the submit button once the request is complete, which will start the DOV review process.

Agency Information: This form is required for all vehicle acquisitions. Submit one (1) form per vehicle type per order.

All procurements for vehicles require an approved Remedy PBC prior to a vehicle order.

[Link to Cost Cutting and New Measures for Reviews of Procurements](#)

PBC Approved Please Select Enter PBC

STEP 1 (Required field are marked in red.)

Calculator

<u>Annual Miles</u>	<u>Annual Commuting Miles</u>	<u>Estimated Useful Life Yrs.</u> New GSA	
(Amount shown on purchase order) <u>Vehicle Purchase Price</u>	(Double-Click Below to Follow Link) www.kbb.com Purchase Residual Value Lease Residual Value (4 yrs)	(Repair Estimate from State Garage) <u>Estimated Cost to Repair Current Vehicle</u>	<u>GSA Purchase Price</u>
<u>Annual Parking Cost</u>	<u>Annual Vehicle Operating Cost →→→</u>	Small SUV Hybrid Small Sedan Medium Sedan Minivan Truck/VAN Police Full Size Police SUV	\$.173 per mile + \$1000 \$.175 per mile + \$1000 \$.245 per mile + \$1000 \$.286 per mile + \$1000 \$.315 per mile + \$1000 \$.238 per mile + \$1000 \$.223 per mile + \$1000
<u>Lease Payments</u> (Base Interest Rate 4.2% and 4 yrs) (Double-Click Below to Follow Link) www.timevalue.com	Please use the figures on the right hand side to perform this calculation: annual miles times cost per mile, then add insurance to find the annual operating cost. Example: Medium Sedan <u>Annual Miles * Per Mile + Insurance Equal Op Cost</u> 18,000 * \$.245 + \$1000 = \$5410		
Press Tab to update all calculations.	Auto-Calculated Cost Fields		

Note: The calculations performed determine the best-case scenario on a cost basis as that option is available.

<u>Reimbursement</u> \$0.00	<u>Maintain Current Vehicle</u> \$0.00	<u>Finance</u>	<u>New Vehicle</u>	<u>GSA/ Surplus</u>	<u>Annual Lease</u> \$0.00
<u>Annual Business Miles</u> 0	<u>%Business Miles</u>	<u>Finance Payment</u> Quarterly Payment \$0.00 Total Interest \$0.00	<u>New Vehicle Cost Per Mile</u>	<u>Lease Cost Per Mile</u>	

STEP 2

Vehicle Request

<u>Agency</u>	A through H Please Select H through Z Please Select	<u>Tracking Number (Assigned by CMS)</u>	Ref Doc #
<u>Program</u>		<u>Governor's Jurisdiction</u>	Please Select
<u>Date Submitted</u>		<u>Request Type</u>	Please Select
<u>Vehicle Coordinator Contact</u>	Last name: First name:	<u>Fleet Addition</u>	Please Select
<u>Telephone #</u>		<u>Acquisition Funding</u>	Please Select
<u>Email Address</u>		<u>Fund Number</u>	
Vehicle Requested Information:			
<u>Vehicle Description</u>	<u>Year</u> Please Select <u>Make</u> Please Select <u>Model</u>	<u>Surplus Equip.</u>	<u>Federal Compliance</u> Please Select
<u>30 ILCS 500/25-75 compliant?</u>	Please Select	<u>Engine Type</u>	Please Select
<u>Vehicle Type</u>	Please Select	<u>Vehicle Quantity</u>	<u>Justification if non "U" plate:</u> Please Select Typical # of passengers Please Select
(Exclude Large Trucks) (Double-Click Below to Follow Link) www.fueleconomy.gov	<u>New Vehicle Café Rating mpg City:</u>	<u>New Vehicle Café Rating mpg Hwy:</u>	<u>Carbon Footprint:</u>
Vehicle Use Information:			
<u>How is the vehicle critical to agency mission?</u>		<u>Vehicle Use Code</u> <u>Non-Pool (01-19), or</u>	Please Select
<u>Describe why this vehicle type is needed?</u>		<u>Vehicle Use Code</u> <u>Pool (51-70 & 99)</u>	Please Select
<u>Is replacement vehicle to be used in the same application as</u>	Please Select	<u>If no, please explain.</u>	

<u>turn-in vehicle?</u>			
<u>Use Frequency</u>	Please Select		<u>Headquarters</u> Please Select
<u>Primary Driver</u>	Last name: First name:		<u>Working Title</u>
<u>If Personally Assigned indicate Criteria</u>	Please Select		<u># miles from home to headquarters</u>
<u>Parking Information:</u>	Location:		<u>If denied, describe how transportation need will be fulfilled</u>
Agency Head Signature: Please select _____			Date __/__/__
FOR DIVISION OF VEHICLES OFFICE USE ONLY:			
DOV Recommendation		Bureau Recommendation	

STEP 3

EXCEPTION REQUEST

Please check the exception that applies, print and obtain agency head signature.

EXCEPTION – FUEL ECONOMY STANDARDS / CAFÉ RATING

In accordance with 44 Ill. Adm. Code 5040.210 Fuel Economy Standards, the (requesting agency) requests exception from the fuel economy standard / café rating for this vehicle request. Justification to include: Why a more economical vehicle cannot fulfill the operational needs of the agency and how the non-compliant vehicle provides the means to carry out the functions of the agency.

Detailed Justification:

FLEET ADDITION REQUEST

In accordance with 44 Ill. Adm. Code 5040.210(b), the (requesting agency) requests a Fleet Addition.

b) All requests, whether replacements or additions to fleet, must be justified. The need for the vehicle and the type requested must be documented.

Justification to include: documentation from Governor’s Office of Management and Budget (GOMB) on approval of additional headcount; GOMB contact for budget approval for increased fleet; legislation or executive order expanding an existing or implementing a new program that requires staff to utilize vehicles to perform job.

Detailed Justification:

EXCEPTION – BUSINESS MILES ARE LESS THAN THE BREAKEVEN CRITERIA, LISTED BELOW:

CMS may also approve vehicle acquisitions that are in the State's best interests based on criteria in addition to mileage break-even. For example, developing technologies such as hybrid or electric vehicles have been determined to be beneficial to the State due to reduced harmful emissions.

- Usage less than economic break-even may be approved by the Manager of the Division of Vehicles upon explanation from the agency head of operational needs justifying lesser usage, when there is no alternative available to carry out agency work functions, or when it is in the State's best interests to do so. As available, vehicles obtained from CMS, Surplus Property should be substituted for new vehicles when operationally efficient to reduce the State's cost per mile.
- A break-even mileage threshold by vehicle type is maintained and published on the CMS, Division of Vehicles website and through communications with agency Vehicle Coordinators at least annually for use in making cost effective vehicle and employee transportation decisions. Break-even information will be one of the factors CMS considers when making a determination on a vehicle acquisition request.

BREAKEVEN - PER VEHICLE TYPE

<u>Ford Focus</u> (Compact Sedan) 7,139 miles	<u>Chevrolet Malibu</u> (Mid-sized Sedan) 9,464 miles	<u>Ford Fusion</u> (Mid-sized Hybrid) 10,513 miles	<u>Ford Hybrid Escape</u> (Small SUV) 11,319 miles	<u>Dodge Grand Caravan</u> (Minivan) 12,258 miles	<u>Ford F150</u> (Lt. Dty Trk/Van) 12,110 miles
<u>Chevrolet Impala Police Patrol</u> 10,471 miles	<u>Chevrolet Caprice Police Pursuit</u> 13,293 miles	<u>Ford Police Intereceptor Utility</u> 12,807 miles			

Detailed Justification:

EXEMPTION – 30 ILCS 500/25-75.

Effective July 1, 2007, 30 ILCS 500/25-75 requires, with limited exceptions, that all automobiles or light duty trucks purchased with state funds be flexible fuel vehicles (FFV) or hybrid vehicles. Heavy duty trucks are not affected by the Act. Justification to include why a compliant vehicle does not meet your agency operational needs.

To request an exemption to 30 ILCS 500/25-75, detailed justification is required.

(Potential exemptions)

- Public safety or health factors such as undercover surveillance vehicles;
- Vehicles utilized to provide transport for physically impaired passengers or drivers;
- When an agency must replace multiple vehicles, safety considerations as well as cost may be considered. If the cost differential between the compliant and non-compliant vehicles will allow the agency to purchase one or more additional non-compliant vehicles, then the Act may be waived; or
- If a manufacturer of a compliant vehicle does not make it available for government fleet sales, or the manufacturer or seller cannot or will not agree to state standard procurement contract requirements.

Detailed Justification:

(If an exception is selected the following signature is needed.)

Agency Head Signature

Date

STEP 4 Turn in vehicle data & replacement vehicle tag # when different. (Please use arrow keys to navigate in table)

Tracking #	Year	Make	Model	Mileage/Engine hrs		List turn in vehicle and vehicle being replaced. If one in same, show same in replaced.		(Exclude Large Trucks) Double-Click Below to Follow Link www.fueleconomy.gov		Carbon Footprint
				Turn In	Replaced	Turn In	Replaced	City	Hwy	

[STEP 5](#)  **[STEP 6](#)** 

Detailed Instructions
Select y/n if PBC is approved
Enter PBC number

<p>STEP 1 – perform cost calculation to determine: employee reimbursement for use of personal vehicle, maintain current vehicle, finance, purchase new, purchase GSA, or annual lease:</p> <ul style="list-style-type: none"> • annual miles driven (breakeven criteria) • annual commuting miles driven (actual) • enter estimated useful life (8 years new, 4 years GSA) • vehicle purchase price • purchase residual value – click link that takes you to Kelly Blue Book <ol style="list-style-type: none"> 1. choose what’s my current car worth, I plan to trade it in. 2. select (example & is based upon useful life of new vehicle-8 years old) 2004 Chevrolet Malibu - NEXT 3. select BLUE BOOK VALUE (ARROW) 4. choose sedan (ARROW) 4D (Choose this style) and applicable options and mileage of _____ (mileage based on 8 years). 5. select check condition – tell us condition 6. select good (sell or trade) 7. select trade-in value <p>Kelly Blue Book gives you the residual value \$_____ – write this value down, exit KBB (takes you back to AFR) to the purchase residual value</p> • lease residual value – click link that takes you to Kelly Blue Book <ol style="list-style-type: none"> 1. choose what’s my current car worth, I plan to trade it in. 2. select (example & is based upon 4 years, maximum for a lease, useful life) 2008 Chevrolet Malibu - NEXT 3. select BLUE BOOK VALUE (ARROW) 4. choose sedan (ARROW) 4D (Choose this style) and applicable options and mileage of _____ (mileage based on 4 years). 5. select check condition – tell us condition. 6. select good (sell or trade) 7. select trade-in value <p>Kelly Blue Book gives you the residual value \$_____ write this value down, exit KBB (takes you back to AFR) to the lease residual value</p> • enter cost to repair existing vehicle – estimate provided by a state garage - example \$2500 for surplus vehicle enter estimated cost to make roadworthy • enter estimated price for an equivalent GSA vehicle (at times one-half the price of new). • enter annual parking costs if applicable - \$1100 • calculate, then enter the operating cost (annual miles x cost per mile for vehicle type requested i.e., medium sedan .18,000 miles times .245 plus annual cost of insurance of \$1000 equates to \$5410. • lease payment – click timevalue link scroll to How much will my lease payment be. Enter vehicle cost, enter lease residual value (from previous look-up on kbb), at 4.2% , 0 advanced payments and then press compute – enter result in lease payment field – i.e., \$275, then tab to complete Step 2. 	<p>STEP 2 – Form</p> <ul style="list-style-type: none"> • Select agency a-h or h-v • Enter tracking number – IGPS Requisition or Contract Release Order • Enter Agency Reference Document Number • Enter agency program, or division • Select Gov jurisdiction – y/n • Enter date • Select request type • Enter agency vehicle coordinator – last name, first name • Select fleet addition – y/n • Enter telephone number • Select acquisition funding - state/federal • Enter email address • Enter fund number • Select new vehicle year • Select new vehicle make • Enter vehicle model • Provide equipment # for a surplus vehicle • Select federal compliance • Select 30 ILCS 500/25-75. compliant - y/n • Select engine type • Select vehicle type • Enter Vehicle Quantity • Select non-U plate justification • Select typical number of passengers - 0-15 • Double-click on café rating • Write down then enter city/highway mpg & carbon footprint of new vehicle • Describe how vehicle is critical to agency mission (how it will be used) • Select vehicle use code • Describe why vehicle type needed: If non-compliant with 30 ILCS 500/25-75 – an exception request is required – see Step 3. • Select vehicle use code • Select if new vehicle will be used in same application as old – y/n • Enter reason if new vehicle will not be used in same application as old • Select use frequency • Select headquarters - Office, home, vehicle • Enter primary driver – last name, first name • Enter primary driver working title • Select personally assigned criteria • Enter number of miles from home to headquarters • Enter parking information (i.e., JRTC, SOI, Stratton Building, etc) • Enter if denied how transportation need will be fulfilled • Select – Signed (obtain agency head signature), or N/A if transaction is for an internal agency vehicle transfer.
<p>STEP 3 - Exception Request - applies to:</p> <ul style="list-style-type: none"> • Vehicle type requested does not meet fuel economy standard. • Is an increase to your agency fleet. • Business usage is below the breakeven criteria. • Does not comply with 30 ILCS 500/25-75. <p>Check exception that applies, provide detailed justification for exception, print, obtain agency head signature.</p> <p>The Exception Request is to accompany the signed Fleet Request</p>	<p>STEP 4 - Enter turn-in vehicles data in the table., also include equipment number of vehicle being replaced when different from the turn-in vehicle. Please use arrow keys to navigate in table – tracking (IGPS #), year, make, model, mileage, equipment number, café rating, & carbon footprint. DO NOT ENTER INFORMATION IN THE SHADED FIELDS.</p>
<p>STEP 5 - Print /save document – DOV requires agency head signature on document prior to processing – have agency head sign and scan or fax to: 217/524-1847</p>	<p>STEP 6 - Submit – this sends document directly to CMS/DOV for review and consideration of approval.</p>

Exhibit a8
CMS Fuel Sale Locations

CMS FUEL SALE LOCATIONS

LOC ID	GARAGE	REFERENCE NAME	AGENCY STAFFING LOCATION	LOCATION	ADDRESS	ADDRESS2	CITY	ZIP	CMS OWNED TANKS	FUEL TANK SIZE				
										87 GASOHOL	DIESEL	ETHANOL	RFG	PETROVEND*
02	21	NAPERVILLE	IDOT	SERVICE STATION #02	28W731 OGDEN AVE		NAPERVILLE	60563	X		12,000			
03	23	TOWANDA	IDOT	TOWANDA	ROUTE 1 BOX 203		TOWANDA	61776	X					
04	4	LINCOLN AVE	CMS	LINCOLN AVENUE GARAGE #04	650 N LINCOLN		SPRINGFIELD	62702	X	10,000	10,000			YES
5	21	LANDSCAPE	IDOT	LANDSCAPE	1260 WEST AUGUSTA BLVD		CHICAGO	60622	X	15,000		1,000		
10	21	I-290 BRIDGE	IDOT	SERVICE STATION #10	DISTRICT BRIDGE	1101 BIESTERFIELD ROAD	ELK GROVE	60007	X		10,000		10,000	
11	22	MORRISON	IDOT	SERVICE STATION #11	13590 GARDEN PLAIN ROAD	2 BLOCKS W OF RT 30	MORRISON	61270			12,000			
12	22	MT. CARROLL	IDOT	SERVICE STATION #12	ROUTE 3 BOX 120	S US RT 52	MT. CARROLL	61053			12,000			
13	23	WENONA	IDOT	SERVICE STATION #13	ROUTE 1 BOX 92	US 51	WENONA	61377	X		10,000			
14	23	BLOOMINGTON	IDOT	SERVICE STATION #14	2502 SPRINGFIELD ROAD	RR 3	BLOOMINGTON	61701	X		10,000			
15	31	BELLEVILLE	IDOT	SERVICE STATION #15	2107 FREEBURG AVENUE	IL 13	BELLEVILLE	62221	X		10,000			
16	22	CRESTON	IDOT	SERVICE STATION #16	5870 S MULFORD ROAD		CRESTON	60113			10,000			
17	21	RODENBURG / ROSELLE / O'HARE	IDOT	SERVICE STATION #17	1480 RODENBURG ROAD		ROSELLE	60172			15,000			
18	22	BELVIDERE	IDOT	SERVICE STATION #18	9797 IL RT 96		BELVIDERE	61008			12,000			
19	22	ROCKFORD	IDOT	SERVICE STATION #19	4109 11ST STREET	WEST SIDE US 51	ROCKFORD	61100			12,000			
20	20	CENTRAL - SPRINGFIELD	CMS	CENTRAL STATE GARAGE #20	200 E ASH		SPRINGFIELD	62704	X	12,000		500		YES
21	21	ELGIN	CMS	ELGIN STATE GARAGE #21	595 S STATE STREET		ELGIN	60123	X		10,000		10,000	YES
22	22	DIXON	CMS	DIXON STATE GARAGE #22	817 DEPOT AVENUE		DIXON	61021	X	10,000	10,000			YES
23	23	OTTAWA	CMS	OTTAWA STATE GARAGE #23	1620 PORTER STREET		OTTAWA	61350	X	10,000	10,000			YES
24	24	WATSEKA	CMS	WATSEKA STATE GARAGE #24	111 YOUNT AVE		WATSEKA	60970	X	10,000	10,000			YES
25	25	PEORIA	CMS	PEORIA STATE GARAGE #25	6510 W US 150		EDWARDS	61528	X	10,000	10,000			YES
26	26	MONMOUTH	CMS	MONMOUTH STATE GARAGE#	710 180TH AVE	ROUTE 4	MONMOUTH	61462	X	10,000	10,000			YES
27	27	PARIS	CMS	PARIS STATE GARAGE #27	ROUTE 133 W		PARIS	61944	X	10,000	10,000			YES
28	28	CHAMPAIGN	CMS	CHAMPAIGN STATE GARAGE #28	PO BOX 1577	201 EISNER	CHAMPAIGN	61820	X	10,000	10,000			YES
29	29	EFFINGHAM	CMS	EFFINGHAM STATE GARAGE #29	PO BOX 587	400 W WABASH	EFFINGHAM	62401	X	10,000	10,000			YES
31	31	COLLINSVILLE	CMS	COLLINSVILLE STATE GARAGE #31	1104 EASTPORT PLAZA		COLLINSVILLE	62234	X	10,000	10,000			YES
32	32	CARBONDALE	CMS	CARBONDALE STATE GARAGE #32	2801 W MURPHYSBORO		CARBONDALE	62901	X	10,000				YES
33	22	ROCK FALLS	IDOT	SERVICE STATION #33	1004 E US RT 30	3/4 MI E OF US 88	ROCK FALLS	61071			12,000			
35	27	TUSCOLA	IDOT	SERVICE STATION #35	1200 E US 36	RR 1	TUSCOLA	61953	X		6,000			
36	22	STOCKTON	IDOT	SERVICE STATION #36	STOCKTON MAINTENANCE YARD	600 N SIMMONS STREET	STOCKTON	61085			12,000			
37	21	SCHAUMBURG	IDOT	SERVICE STATION #37	201 W CENTER COURT		SCHAUMBURG	60196					5,000	YES
39	22	LYNN CENTER	IDOT	SERVICE STATION #39	4687 RT 81	SOUTH SIDE OF IL RT 81	LYNN CENTER	61262			10,000			
42	42	HILLSBORO	CMS	HILLSBORO STATE GARAGE #42	GRAHAM CORRECTIONAL CENTER	ROUTE 185 S PO BOX 499	HILLSBORO	62049	X	10,000	2,000			YES
43	21	ROMEDEVILLE	IDOT	SERVICE STATION #43	JCT I55 & RT 53	RR 5	BOLINGBROOK	60439	X		10,000			
44	44	CENTRALIA	CMS	CENTRALIA STATE GARAGE #44	CENTRALIA CORRECTIONAL CENTER	1266 SHATTUC ROAD	CENTRALIA	62801	X	10,000	2,000			
45	22	SILVIS	IDOT	SERVICE STATION #45	1500 214TH ST N		EAST MOLINE	9476			12,000			
46	31	BOWMAN / E. ST. LOUIS	IDOT	BOWMAN DOT YARD #46	728 EXCHANGE AVE		EAST ST. LOUIS	1538			10,000			
47	23	FORREST	IDOT	SERVICE STATION #47	1021 N CENTER STREET	IL RT 47	FORREST	61741			2,000			
48	24	TINLEY PARK	DHS	TINLEY PARK STATE GARAGE #48	TINLEY PARK MENTAL HEALTH CENTER	7400 W 183RD	TINLEY PARK	60477			10,000		10,000	YES
50	21	EDENS	IDOT	SERVICE STATION #50	EDENS EXPRESSWAY	#2 HAPP ROAD	NORTHFIELD	60093	X		10,000			
51	21	KENNEDY	IDOT	SERVICE STATION #51	KENNEDY EXPRESSWAY	5027 N CENTRAL AVE	CHICAGO	60607			10,000			
52	21	EISENHOWER	IDOT	SERVICE STATION #52	EISENHOWER EXPRESSWAY	IDOT YARD, SERVICE STATION #52	CHICAGO	60644	X		10,000			
53	21	DAN RYAN	IDOT	DAN RYAN EXPRESSWAY YARD, SER STA #53	6543 S WENTWORTH AVE		CHICAGO	60621	X		12,000			
54	21	CALUMET-BISHOP/FORD	IDOT	BISHOP/FORD SERVICE STATION #54	16915 VAN DAM ROAD	166TH & VAN DAM ROAD	SOUTH HOLLAND	60473	X		12,000			
55	21	STEVENSON	IDOT	SERVICE STATION #55	STEVENSON EXPRESSWAY	JOLIET RD & FIRST AVE	MCCOOK	60525	X		10,000			
56	21	NORTHBROOK	IDOT	SERVICE STATION #56	1916 TECHNY ROAD		NORTHBROOK	60062	X		10,000			
57	21	ARLINGTON HEIGHTS	IDOT	SERVICE STATION #57	210 E NOVES ST		ARLINGTON HEIGHTS	60005	X		15,000			
58	21	HILLSIDE	IDOT	SERVICE STATION #58	HILLSIDE YARD	EAST AVE & MAY ST	HILLSIDE	60162	X		10,000			
59	21	ETP	IDOT	EMERGENCY TRAFFIC PATROL, SER STA #59	3501 S NORMAL		CHICAGO	60609	X		12,000		12,000	YES
60	21	ALSIP	IDOT	SERVICE STATION #60	11801 S RIDGELAND	119TH ST & RIDGELAND AVE	WORTH	60482			10,000			
61	21	NORTHSIDE	IDOT	IDOT NORTHSIDE YARD, SERVICE STATION #61	4051 NORTH HARLEM AVENUE		CHICAGO	60634	X		10,000			
62	21	I-57	IDOT	SERVICE STATION #62	16010 S CRAWFORD AVE		MARKHAM	60426	X		10,000			
66	27	GREENUP	IDOT	SERVICE STATION #66	403 W RT 40		GREENUP	62428	X		6,000			
67	31	FAIRVIEW HEIGHTS	IDOT	SERVICE STATION #67	FAIRVIEW HEIGHTS DIST 8	9601 ST CLAIR AVE	FAIRVIEW HEIGHTS	62208	X		10,000			
68	23	PONTIAC	IDOT	SERVICE STATION #68	12970 E 1700 N ROAD	2 MI W OF PONTIAC	PONTIAC	61764	X	10,000	10,000			YES
69	23	KANKAKEE	IDOT	SERVICE STATION #69	1455 E BROOKMONT	US 54 & GRINNEL ROAD	KANKAKEE	60901	X		10,000			
70	21	WOODSTOCK	IDOT	SERVICE STATION #70	11916 CATALPA	N FRONTAGE RD JCT RT 14 & 47	WOODSTOCK	60098	X		10,000			
71	23	GIBSON CITY	IDOT	SERVICE STATION #71	915 S ILLINOIS DRIVE	IL RT 9 & US 54	GIBSON CITY	60936	X		4,000			

72	22	GALVA	IDOT	SERVICE STATION #72	818 SE 1ST ST	NORTH HIGH RIDGE ROAD	GALVA	61434			6,000		
73	31	NASHVILLE	IDOT	IDOT #73	9571 IDOT SHED ROAD	N OLD RT 127	NASHVILLE	62263	X		10,000		
74	22	GALENA	IDOT	SERVICE STATION #74	HIGH RIDGE ROAD	1.25 MI W OF IL RT 84	GALENA	61036			12,000		
75	22	LADD	IDOT	IDOT MAINTENANCE YARD #75	ROUTE 1		SPRING VALLEY	61362			10,000		
76	29	EFFINGHAM	IDOT	SERVICE STATION #76	US 40, RR 6		EFFINGHAM	62401	X		1,000		
77	22	SYCAMORE	IDOT	SERVICE STATION #77	351 PAGE ST	N WALNUT STREET	SYCAMORE	60178			12,000		
78	22	AMBOY	IDOT	SERVICE STATION #78	1502 US 30		AMBOY	61310			12,000		
79	22	MILAN	IDOT	SERVICE STATION #79	4128 69TH AVENUE		MILAN	61264			15,000		
80	22	ROSCOE	IDOT	SERVICE STATION #80	9988 N 2ND ST	US 51 S	ROSCOE	61073			10,000		
81	27	MARSHALL	IDOT	SERVICE STATION #81	109 EDGEWOOD DRIVE	RR 2	MARSHALL	62441	X		6,000		
82	4	RIVERTON	IDOT	SERVICE STATION #82	OLD US 36		RIVERTON	62561			10,000		
83	4	LITCHFIELD	IDOT	SERVICE STATION #83	IDOT MAINTENANCE SITE	13456 OLD ROUTE 66	LITCHFIELD	62056			10,000		
85	22	PRINCETON	IDOT	SERVICE STATION #85	17999 1500TH N AVENUE		PRINCETON	61356			15,000		
86	27	MATTOON	IDOT	SERVICE STATION #86	8640 OLD STATE ROAD	IL RT 16 RR 3	MATTOON	61938	X		6,000		
87	4	DAY LABOR	IDOT	SERVICE STATION #87	DAY LABOR YARD	722 N LINCOLN AVE	SPRINGFIELD	62706			10,000		
89	21	ST. CHARLES	IDOT	SERVICE STATION #89	38W027 RT 38		ST. CHARLES	60174			10,000		
90	22	OREGON	IDOT	SERVICE STATION #90	511 HILL ST		OREGON	61061			12,000		
91	21	GURNEE	IDOT	SERVICE STATION #91	3516 W WASHINGTON		GURNEE	3396	X		10,000		
93	22	GENESE0	IDOT	SERVICE STATION #93	828 N COLLEGE AVE	EAST OF RT 82	GENESE0	61254			10,000		
94	22	FREEP0RT	IDOT	SERVICE STATION #94	1856 BOLTON ROAD	1 MI E OF ELEROY	FREEP0RT	61032			12,000		
95	21	HARVEY	IDOT	SERVICE STATION #95	16738 S LATHROP AVE		HARVEY	60426	X		10,000		
96	21	JOLIET	IDOT	SERVICE STATION #96	RT 53 & CANTON FARM ROAD		LOCKPORT	60441			10,000	5,000	
97	21	NEW LENOX	IDOT	SERVICE STATION #97	1400 W MAPLE ST	INTERSTATE 80 & US 30	NEW LENOX	60451	X		10,000	5,000	
98	21	OAKBROOK	IDOT	SERVICE STATION #98	17W125 BUTTERFIELD ROAD		VILLA PARK	60181	X		10,000		
99	21	GRAYSLAKE	IDOT	SERVICE STATION #99	219 N BARRON BLVD	IL 83	GRAYSLAKE	60030	X		12,000		

*PetroVend - CMS IT staff perform all the system maintenance and generate agency billings

IDOT & DOC have numerous locations with fuel tanks that are below the minimum tank size for contract purchases

Exhibit a9
CMS State Employee Transportation
Policy, March 2012

State Employee Business Transportation Policy, March 2012

State Travel Control Board Rules indicate agencies and drivers are responsible to select the least costly mode of transportation available for state business. The following policy is intended to assist agencies in cutting the costs and environmental impacts of transportation and in choosing the most efficient transportation option available.

1. Consider if the travel is essential and avoid it if possible utilizing telephone, videoconference or webinar when feasible.
2. Consider mass transit such as Amtrak, train fares are very low cost and provide employees time to work while in transit.
3. If transport by car is the most cost effective option and a State car is available, use it. A fully utilized state vehicle is cost efficient. Contact your agency vehicle coordinator for information on availability. To be fully utilized a vehicle should accumulate a minimum mileage called "breakeven" annually. Currently breakeven mileage for a new compact car is about 8,099 mi., an intermediate sedan is 11,069 mi. and a pickup truck it is 14,909 mi.

State vehicles are most efficiently utilized in pools as opposed to assignment to individuals, this helps ensure they accumulate enough annual miles to maintain cost efficiency. Special circumstances such as emergency equipment may impact determinations. To discuss methods to more effectively pool your agency fleet vehicles contact the CMS, Division of Vehicles (DOV). If an individual driver accumulates more than 8,099 business miles per year discuss the most cost effective options with your agency vehicle coordinator.

4. Using a personal car and receiving mileage reimbursement can be expensive, consider the available options. If a state car is not available, please look to car sharing or car rental. The state currently has established competitively bid contracts with Zipcar car sharing and Enterprise Car Rental to supplement your transportation needs. These options can be cheaper than reimbursement and your agency vehicle or travel coordinator can provide further details.
5. Zipcar car sharing is available for hourly rental and travel up to two days, costing \$6 per hour, with a maximum of \$70 per day (24 hour period). The hourly rate includes fuel, insurance and maintenance and the vendor will direct bill agencies. Each day, you are allowed 180 miles (costs 0.25 per mile after that) and it's a round trip rental. The car must be returned from where you picked it up. You must be a member to participate (no cost) and to sign up for this service go to: www.zipcar.com/stateofillinois.
6. Enterprise Car Rental is currently under contract to provide full day and weekly rentals to meet longer term needs. Rates start at \$33 per day (\$160 weekly), include insurance and maintenance and the vendor will direct bill agencies, excluding fuel. Rentals include unlimited mileage, one-way service is available and rental vehicles can be returned to any location. For reservations call 800-736-8222 or www.enterprise.com use business account # XZ15679 and pin # STA. To sign your agency/bureau up for direct billing, please contact your Travel Coordinator or DOV directly.

Rentals and car sharing are designed for short term, intermittent or periodic use. If available, state pool cars are recommended as a first option to maximize use. To maintain cost efficiency they must be fully utilized and accumulate enough miles relative to breakeven to justify keeping them.

This policy applies to all agencies under the Governor. Agencies may adopt more stringent policies internally. For further information on travel, fleet policies, rules and efficient, green transportation solutions contact your agency vehicle coordinator, travel coordinator or DOV.

When the state acquires vehicles, fuel efficiency and reduction of harmful emissions are important considerations. Use sustainable biofuels including E85 and biodiesel when available. Choose the most fuel efficient vehicle among the available options in vehicle pools.

Exhibit a10
Illinois Administrative Code 5040.410,
Scheduled Inspection and Maintenance

SUBTITLE D

Section 5040.410 Scheduled Inspection and Maintenance

- a) Agencies shall have vehicles inspected by DCMS at least once per year and shall maintain vehicles in accordance with the schedules provided by DCMS or with other schedules acceptable to DCMS that provide for proper care and maintenance of special use vehicles.
- b) Agencies Acquiring a Surplus Vehicle from the Division of Property Control: Once the requesting agency has obtained written approval from the Division of Vehicles' Manager, the Division of Property Control may be contacted and the surplus vehicle acquired in accordance with their procedures. The vehicle must then be brought to a State garage, at which time it will be inspected and repaired if applicable at the expense of the requesting agency to ensure that the vehicle is road worthy and void of any safety hazards prior to being placed back in service. The Division of Vehicles must also be notified in writing or by telephone prior to the vehicle being brought to a State garage so that an equipment number can be assigned and a credit card prepared.
- c) Odometer: Each agency is responsible for the immediate repair and/or replacement of a malfunctioning odometer. In the event a new odometer is required, one of the following conditions must be met.
 - 1) If a new odometer is installed and the current vehicle mileage is shown on the odometer no further action is necessary.
 - 2) If a new odometer is installed and the mileage is left at zero, the Manager of the Division of Vehicles must be immediately notified in writing so that the appropriate information can be entered on the vehicle's title, and replacement odometer.

(Source: Amended at 9 Ill. Reg. 13720, effective August 21, 1985)

SUBTITLE D

Section 5040.550 Gasoline Purchase

- a) Purchases of fuel, oil, and related items for the operation of State-owned equipment must be made from the most economical source. Unleaded gasoline (with ethanol blended in, often called Gasohol) shall, however, be used where available. Employees are required to use E-85 (85% ethanol) and bio-diesel when operating flexible fueled and diesel powered vehicles in the State fleet, whenever practical.
- b) If there is a State-owned garage or State-owned service station within a reasonable distance, the driver should make purchases at this source. State service stations are available on the State of Illinois Enterprise web at <http://www.intra.state.il.us/poliproc/vehicleguide.pdf>.
- c) If a State-owned garage or State-owned service station is not conveniently located, an appropriately located privately operated station with a self-service island shall be the source of purchase, except when the driver is physically unable to operate a self-service pump.

(Source: Amended at 30 Ill. Reg. 4587, effective March 1, 2006)

SUBTITLE D

Exhibit b1
NIU Business Procedure Manual,
Procedure No. 8-5



Transportation Policies

Procedure No. 8-5

Updated 8/2011

I. Policy - Buses

University-owned buses are maintained for the purpose of providing transportation for official business of the university. Official business involving use of buses is outlined in the priorities listed below. In accordance with monies budgeted by departments for travel by buses, department chairmen and heads are delegated the responsibility to approve requests for the use of university-owned or controlled buses. Occasionally, the demand for charter or shuttle bus service is greater than NIU Transportation Services can provide internally. In those circumstances, the manager of Transportation Services may arrange for a contracted bus to be provided. For non-academic related trips, the higher cost of a contracted bus may be passed on to the user. No higher priority use may bump an already-scheduled, lower-priority use within 15 calendar days of that scheduled trip. Priority for use of buses is as follows:

- A. For use directly related to instruction in which the use may be considered as part of a credit course. For such use students may be requested to contribute toward the expense of the trip.
- B. For use directly related to educationally-related activities such as workshops: institutes either for or not for credit. For this use, the workshop or the institute is expected to pay for the use of the buses.
- C. For use by academic departments for educationally-related purposes.
- D. For use directly related to recognized intercollegiate activities. Involved herein is transportation for athletic teams and their coaches. Intercollegiate athletics bears expenses herein.
- E. For use of sponsored activities. Student activities that are sponsored with funds from student activities fees or other university funds are normally permitted the use of university buses for their activities. Such activities, of course, must be legal and in the public interest in the judgment of the president. The fund of the student activity itself or payment by the users is necessary to pay for the transportation involved.
- F. For uses involved in public relations. The use of university-owned or controlled buses for travel involving public relations is necessarily limited. Even though many university-related organizations have established accounts within the university, their use of buses requires approval by the president or his designee. Generally, it is not possible to permit use of buses by organizations listed with accounts identified as "convenience amounts" and "other organizations." The use of buses for travel related to conferences is limited to use by university-sponsored groups, and even in such latter cases must be approved by the president or his designee and must be paid for by the user.

Faculty, staff, and students of NIU, in accordance with the above priorities, are given first choice of the use of university buses. The Executive Vice President, Business and Finance, and Chief of Operations, or his designee may authorize the use of university buses by other State agencies provided such are available and provided appropriate reimbursement arrangements have been completed.

Smoking is prohibited in University buses by state law. The use of alcohol in or on university-owned or contracted buses is prohibited.

II. Policy - Other Vehicles

University-owned automobiles are maintained for the purpose of providing transportation for official university business of faculty, administrators, graduate assistants, and operating staff. In accordance with monies budgeted by departments for automotive expense, department chairmen and heads are delegated the responsibility to approve requests by employees for the use of university-owned vehicles and to verify that the driver has a valid license.

An employee of Northern Illinois University is eligible to drive a university-owned vehicle if he/she is acting for or on behalf of the university and within the scope of his/her employment, while operating such a vehicle. An employee, for purposes of this policy, is defined as any individual who receives compensation from the university for services performed provided such compensation is taxable under either state or federal tax laws. Any individual whose only compensation is a scholarship or fellowship, or any individual who is an independent contractor and whose compensation is not subject to either state or federal tax, would not be considered an employee. A student-employee is eligible to drive a university-owned vehicle only within the scope of his/her student employment.

Other individuals are eligible to drive university-owned/leased vehicles on university business if they have the prior written permission of the president, the vice president of the respective division or their designee(s), and provided the operation or use of the university-owned vehicle is within the scope of such permission. NIU students may become eligible to operate university-owned vehicles with the completion of the "Student Vehicle Use Authorization" form. Completion of the form requires supplying detailed information of the proposed travel, the signature of the student, approval of the sponsoring department or organization, and approval by the respective vice president or designee. All student use of university vehicles, other than within the scope of student employment, requires the completion of this form.

As a result of heightened university safety concerns, as supported by a National Highway Traffic Safety Administration (NHTSA) Consumer Advisory (April 9, 2001), 15-passenger vans are no longer available for general university use. This restriction on official use also extends to employee or departmental use and/or rental of passenger vans from private commercial agencies e.g., Avis, Enterprise, Hertz, etc., or from any other source, including donations or gift-in-kind. It would also preclude the reimbursement for the use of an employee-owned 15-passenger van.

When employees use their own vehicles on university business, university insurance coverage stands in excess of and secondary to the employee's personal insurance coverage.* The state cannot provide primary coverage for such use. Non-employees, using their own vehicles on university business, are not covered by university insurance.

All drivers of university vehicles must have a valid driver's license in their immediate possession. Licenses issued by other states are valid in Illinois. A non-resident from a foreign country is required to hold a valid driver's license issued by such foreign country. **All drivers of university vehicles are subject to review of their driver's license record by Transportation Services and/or Risk Management.**

Travel shall be by the most economical mode available, considering travel time, cost, and work requirements. Generally speaking, it is anticipated that employees who have approval for out-of-state travel will make use of public conveyances. Because of the limited supply of vehicles within the motor pool and public relations considerations, their use for out-of-state travel, especially on trips involving considerable time and miles, is permitted only when circumstances can be justified. All out-of-state use of pool vehicles requires the approval of the president, the respective vice president, or his/her designee. In many instances it may be to the advantage of the university for the employee to fly and rent a vehicle upon arrival so as not to deny other faculty and staff the utilization of the university fleet. Employees flying from O'Hare, Midway, or Rockford airport are encouraged to utilize rental cars or limousine service so as not to deny other employees the use of the university fleet. Limousine service to the airports is available through the Transportation Office. (Contact Transportation Office for further information.)

State-owned automobiles are not available to employees who are personally being reimbursed for services being rendered. Example: it is anticipated that an employee who is being compensated for providing consulting services, or a speech at a conference, commencement, etc., will provide his own transportation for such purposes.

Faculty and staff of NIU are given first choice of the use of the university fleet. The Executive Vice President, Business and Finance, and Chief of Operations or his designee may authorize the use of university vehicles by other state agencies provided such vehicles are available and provided appropriate

reimbursement arrangements have been completed. Priority for the use of the passenger vans and mini-vans will be the same as for the use of the buses.

Under certain circumstances, university vehicles are assigned to a department and/or program. The assignments are made on a temporary basis dependent upon the availability of vehicles and the demand for fleet vehicle use. A periodic review is made of vehicles on assignment, and in the best interest of the university, it may be necessary to return vehicles to the Transportation Motor Pool.

The department or program desiring the assignment of a vehicle should submit a written request to the vice president of their respective division, and approval must be granted (in writing) by the vice president before the Transportation Department is permitted to assign a vehicle.

University employees requesting the use of a university-owned vehicle issued from the motor pool are required to submit a Transportation Request Form which will include the signature of the driver of the vehicle. The Transportation dispatcher will verify by signature card if proper fiscal approval has been given before any action is taken on the request.

NOTE: Persons using their own vehicle for business use should contact their personal insurance carrier to ensure that proper coverage is being provided.

Smoking is prohibited in all University vehicles by State law.

III. **How to Obtain a Pool Vehicle**

- A. Request for transportation should be made at least two (2) weeks in advance of the proposed trip to be reasonably sure of obtaining a vehicle.
- B. Fill out transportation request form, have it signed by your department head, and send it to the Transportation Office. **These forms can be obtained from Central Stores through Materials Management at no charge.**
- C. The Transportation dispatcher will retain one copy of this Transportation Request Form in a permanent transportation file.
 1. The #1 copy will be returned to the applicant stating whether a vehicle is available on the date requested.
 2. Applicant will be given #4 copy of the original request at the time of pickup to complete when vehicle is returned. (See Procedure 8-6).
- D. If the request has been approved, only the driver authorized on the request form will be permitted to pick up the vehicle at the Transportation Office at the time and date requested. More than one driver may be listed on the transportation request form at the time the request is submitted to Transportation for processing. Any listed driver may pick up the requested vehicle. A vehicle will be reassigned if not picked up within two hours of the assigned time, and late cancellation charges will be assessed.
- E. The Transportation dispatcher will assign a vehicle only to a person indicated on the original request form. If a substitute driver is necessary, a new request form will be required and all of the above procedures will be followed before a vehicle is issued.
- F. If there is more than one vehicle involved, a request form with the driver's signature will be required for each vehicle requested. No more than one vehicle will be assigned to any one driver. If multiple vehicles are requested, multiple drivers and requests are required.
- G. Before the vehicle is issued, the driver must present a valid driver's license to the Transportation dispatcher. **Transportation Services may review the driver's record with the Office of the Secretary of State.**
- H. The Transportation dispatcher will verify the signature on the license with that on the

request form. The dispatcher will then complete the request as required and issue keys for the assigned vehicle.

I. Departments having permanently assigned vehicles will be responsible for determining that the person obtaining the vehicle has a valid driver's license. On an annual basis, departments with assigned vehicles will provide to Transportation Services a list of all potential drivers of said vehicles. This list will include each individual's name, driver's license number, and expiration date of the license. Failure to provide this information will result in the loss of university vehicle privileges for that individual and/or department. Transportation Services may review the driver's record with the Office of the Secretary of State.

J. If a university vehicle is not available, the applicant should request approval from the department head for travel funds necessary to use personal car.

K. University vehicles may be picked up between the hours of 6:00 a.m. to 11:30 p.m., Monday through Friday; and 7:00 a.m. to 12 noon on Saturday. The university garage is closed on Sunday.

NOTE: Students who are not employees requesting use of university vehicles should refer to **Policy - Other Vehicles**, third paragraph.

IV. **When Vehicle is Returned**

A. The vehicle should be returned on or before the hour indicated on your "Request for Transportation." Failure to do so may prevent a fellow faculty or staff member from using the vehicle and may result in late return charge.

B. Leave the keys in the ignition and park vehicle at the gas pumps west of the garage.

C. Complete #4 copy of the original request, making sure name is signed. Report on #4 copy of the original request any malfunction of car. For example: Windshield wipers do not work, or brakes grab, or heater does not work.

D. Leave #4 copy (trip ticket) of the original request, gasoline and service charge tickets on the front seat of the unlocked vehicle. If the transportation building is closed, place keys, trip ticket, and gasoline or service charge tickets in the Key Drop Box. The Key Drop Box is located on a light pole in the main parking lot, (Lot T) across Stadium Drive, west of Transportation. Vehicles returned when Transportation is closed should be parked in this lot. Vehicles should be locked when left in this lot.

V. **How to Obtain Local/Contracted Bus Transportation**

A. All requests for bus service from any segment of the university, paid through any fund source, must be sent to Transportation Services. No fund source may directly contract with an external bus service. The sole exception is group travel ground bus service in connection with air travel (this does not include ground transportation to or from any airport within 150 miles of DeKalb); i.e. a team flies to Buffalo and requires ground transportation at that location before flying back to the DeKalb area.

B. To obtain a university bus, follow the same procedure as for cars described in paragraphs I-IV

C. If a university bus is not available, the Transportation Office will obtain a local bus, provided a local bus is available. Usually the cost will be greater for a local bus.

D. Long distances have priority for university buses. The Transportation Office reserves the right to make last-minute changes--from the use of a university bus to a local bus.

E. Bus and driver will be at assigned starting point, as requested by applicant, 15 minutes before time of departure. Any location may be designated as a pick-up point. The Transportation Department reserves the right to change a requested location as safety or logistics demand.

At completion of trip, bus driver will fill out #4 copy of the original request.

VI. Charges for University Fleet Vehicles

A. Sedans -- the greater of the following rates will be charged:

1. \$.365 per mile, or
2. a minimum of \$16.00 for the first two hours plus \$1.60 per hour thereafter.

B. Mini-vans -- the greater of the following rates will be charged:

1. \$.465 per mile, or
2. a minimum of \$22.00 for the first two hours plus \$2.25 per hour thereafter.

C. Eight-Passenger Vans – the greater of the following rates will be charged:

1. \$.505 per mile, or
2. a minimum of \$25.00 for the first two hours, plus \$3.50 per hour thereafter.

D. Passenger vans driven by Transportation Personnel Only -- the greater of the following rates will be charged:

1. \$.505 per mile, or
2. a minimum of \$25.00 for the first two hours, plus \$3.50 per hour thereafter.
Hourly charges for a driver = \$28.00 per hour and additional costs as applicable to the trip.

E. Buses -- the greater of the following rates will be charged:

1. \$3.33 per mile, or
2. \$57.00 per hour
3. For the first three (3) hours, there is a minimum charge of \$180.00 for any bus use.

In addition to the above rates, any costs for overtime, meals, lodging, tolls, and parking fees will be billed to the customer. Overnight bus trips will be charged on an actual-use basis. On a trip of more than one (1) night away from DeKalb, the charge will be for eight (10) hours or actual use, whichever is greater, for each day of "layover."

F. "Trucks --

University departments and sponsored organizations may, under special circumstances, use university-owned trucks. Generally, university-owned trucks are on assignment and, therefore, are not normally available for leasing through the Transportation Department. The rates for a light truck are the greater of the following:

1. Light truck (1/2 ton or less)
 - a. \$.505 per mile, or

b. A minimum of \$25.00 for the first two hours, plus \$3.50 per hour thereafter.

2. Rental -- The Transportation Office can obtain rental trucks of various sizes through a local truck rental agency. Call the Transportation Office for further details. Rental rates, plus fuel cost, will be assessed for the use of a rental truck.

G. If a driver is furnished by the Transportation Department for a sedan, mini-van, carryall, van, or truck, an additional charge of \$28.00 per hour, plus meals, lodging, tolls, and parking, if applicable, will be billed to the customer.

VII. Charges for Permanently Assigned Vehicles

In addition to the charges listed below for each vehicle type, assigned vehicles are assessed a monthly fee equal to the pro-rated monthly cost of a blue parking permit, unless the user department provides proof of purchase of a reserved parking space.

A. Sedans, mini-vans, and passenger vans -- four model years or newer at the beginning of the fiscal year:

1. Sedans--\$375.00 per month or \$.365 per mile, whichever is greater.
2. Mini-vans---\$475.00 per month or \$.465 per mile, whichever is greater.

B. Sedans, mini-vans and passenger vans--five model years or older at the beginning of the fiscal year.

1. Sedans----\$250.00 per month or \$.365 per mile, whichever is greater.
2. Mini-vans--\$280.00 per month or \$.465 per mile, whichever is greater.

NOTE: If the mileage exceeds the monthly charge shown in 1 and 2 above, the higher charge will be assessed. Example: A new sedan is driven 1,500 miles in one month $1,500 \times 365\text{¢} = \547.50 . This rate will be charged to the user as it is higher than the monthly rate of \$375.00.

C. Light trucks (1/2 ton and less) -- \$300.00 per month, plus .505 cents per mile over 325 miles per month, with additional charges for additional equipment.

D. Heavy trucks (more than 1/2 ton) -- Monthly charges determined on a case by case basis.

E. Police Squad SUV -- \$.505 per mile, Toyota Prius Squad - .435 cents per mile.

VIII. Cancellation Fees

A cancellation fee, equal to the minimum charge for the requested vehicle type, will be charged to a department or organization if a previously requested and approved vehicle request is canceled after the following deadlines:

	Cancellation Deadline	Late Cancellation Fees
Sedans	4:30 p.m., the business day before the trip	Equal to minimum charge

Mini-vans	4:30 p.m., the second business day before the trip	Equal to minimum charge
Vans	4:30 p.m., the second business day before the trip	Equal to minimum charge
Buses	48 hours before the trip	Equal to minimum charge

A vehicle not picked up within two hours of the assigned time will be cancelled and charged late cancellation fees.

IX. Expenses Incurred While Driving a University Automobile:

A. When a university vehicle is outside of the DeKalb area and it is impossible to obtain the necessary gasoline, oil, and services at the university garage, the driver should use the Wright Express credit cards.

1. A Wright Express Vehicle Equipment Credit Card is available in each vehicle. It is kept in the glove compartment.
2. Oil company credit cards will be issued on an as needed basis. These cards should be used if the Wright Express Credit Card is rejected.
3. Retain all oil company charge tickets and turn them in to the Transportation Office with the #4 copy of the Request for Transportation upon completion of your trip.
4. On those rare occasions when it is necessary to purchase gasoline with cash, a receipt should be obtained at the time of purchase and submitted for reimbursement at the time the vehicle is returned to Transportation. Transportation departmental funds will be the source of the reimbursement. This type of reimbursement **should not** be included on your travel voucher.

B. If a university automobile develops mechanical trouble while on an out-of-town trip, the following procedures should be followed:

1. If the repairs are under \$100.00, the driver may arrange to have the repair made. The driver should use the Wright Express Credit Card whenever possible. If it becomes necessary to use an alternative form of payment, a receipt should be obtained at the time of service and submitted for reimbursement when the vehicle is returned to Transportation.
2. If the repairs are \$100.00 or more, the driver should telephone Transportation Services, (800) 955-3688, for instructions. This phone is answered 7 days, 24 hours.

X. How to Report an Accident

All accidents, whether or not property damage or injury occurs, must be reported to the Transportation Office as well as the appropriate police agency. In addition, the driver must complete an accident report in the Transportation Services office by noon of the first business day following the accident. Illinois law requires every driver of a motor vehicle in Illinois involved in an accident resulting in personal injury, death, or property damage of \$250.00 or more to forward a written report to the State office within 24 hours in cases of personal injury or death, and within five days if there is only property damage of \$250.00 or more. When an accident occurs outside the State of Illinois, the driver must comply with the requirements of that State. **Failure to comply with the accident reporting requirements can result in insurance coverage being declined and all financial liabilities for personal injuries and property damage being the responsibility of the vehicle driver.**

All previous policies or regulations concerning the use of university-owned vehicles are hereby canceled or revoked.

Exhibit b2
NIU Transportation Services Vehicle
Replacement Policy

Transportation Services Vehicle Replacement Policy

On a semi annual basis, the Transportation Manager shall compile a report of the age and mileage of all University vehicles. Using this report, along with vehicle repair histories, in conjunction with the Garage Foreman, a determination will be made as to which vehicles should be added to the vehicle replacement list. This list is reported annually to the State Senate.

When funds are available, Transportation Services will either seek bids from dealers or uses existing CMS vehicle master contracts, depending which is less expensive. For single vehicles purchased as an emergency replacement, Transportation will seek quotes from individual dealers for an appropriate vehicle, which may be purchased “off the lot”.

With exceptions for emergency vehicles (police), all vehicles will be retained for a minimum of 10 years or 100,000 miles. Vehicles that are damaged beyond the standard industry value may also be replaced.

Reviewed September, 2012

Exhibit b3
NIU Preventive Maintenance Schedule

		Miles Interval	Days Interval
Bus			
A	LOF	5,000	185
B	Front Brake Inspection	35,000	365
C	Rear Brake Inspection	35,000	365
Coolant	replace coolant filter	10,000	365
D	Tag Brake Inspection	35,000	365
Diff	Drain & Refill Differential	35,000	365
F	Fuel Filters	10,000	365
Test Lane	Test Lane		184
TR	Service Transmission	35,000	365
Bus J4500			
A	LOF	7,500	183
B	Front Brake Inspection	35,000	365
C	Rear Brake Inspection	35,000	365
D	Tag Brake Inspection	35,000	365
Diff	Drain & Refill Differential	35,000	365
F	Fuel Filters	15,000	365
N	Service Particulate Igniter Plug	1,000,000	18,250
Test Lane	Test Lane		184
TR	Service Transmission	120,000	1,900
Bus-Small			
A	LOF	5,000	185
B	Front Brake Inspection	35,000	365
C	Rear Brake Inspection	35,000	365
Diff	Drain & Refill Differential	35,000	365
F	Fuel Filters	20,000	365
Test Lane	Test Lane		184
TR	Service Transmission	35,000	365

		Miles Interval	Days Interval
GeoProbe			
A	LOF	4,000	185
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
F	Fuel Filters	8,000	365
Test Lane	Test Lane		184
Hi-Ranger			
A	LOF		183
B	Front Brake Inspection		730
C	Rear Brake Inspection		730
D	Tune		1,461
Test Lane	Test Lane		184
TR	Service Transmission		1,461
Medium Duty Delivery			
A	LOF	4,000	185
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
F	Fuel Filters	8,000	365
Liftgate	Inspect/Drain as needed		365
Test Lane	Test Lane		184
TR	Service Transmission	36,000	1,095
Police Command			
A	Service A	2,500	185

		Miles Interval	Days Interval
Sedans/Pass Vans Hybrid			
A	LOF	5,000	183
B	Front Brake Inspection	25,000	730
C	Rear Brake Inspection	25,000	730
D	Tune	50,000	1,461
TR	Service Transmission	50,000	1,461

Sedans/Passenger Vans			
A	LOF	4,000	183
B	Front Brake Inspection	24,000	730
C	Rear Brake Inspection	24,000	730
D	Tune	48,000	1,461
TR	Service Transmission	48,000	1,461

Sprinter--No Test			
A	LOF	10,000	183
B	Inspect Front Brakes	35,000	366
Brake Fluid	Drain refill Brake Fluid/replace cabin filter	70,000	731
C	Inspect rear Brakes	35,000	366
Diff	Drain & refill differential oil	120,000	3,652
F	Fuel Filter	20,000	366
TR	Service Trans	50,000	735

TRK-4WD-Diesel-Test			
A	LOF	4,000	183
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
F	Fuel Filters	8,000	365
Test Lane	Test Lane		183
TR	Service Transmission	10,000	365

		Miles Interval	Days Interval
TRK-4WD-Gas-Test			
A	LOF	4,000	183
B	Front Brake Inspection	16,000	550
C	rear Brake Inspection	16,000	550
D	Tune	32,000	1,095
Test Lane	Test Lane		183
TR	Service Transmission	10,000	365

Truck-4WD-Gas			
A	LOF	4,000	183
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
D	Tune	32,000	1,095
TR	Service Transmission	10,000	365

Truck-Light Duty			
A	LOF	4,000	183
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
D	Tune	32,000	1,095
TR	Service Transmission	48,000	1,461

Truck-Light Duty -Test			
A	LOF	4,000	183
B	Front Brake Inspection	16,000	550
C	Rear Brake Inspection	16,000	550
D	Tune	32,000	1,095
Test	Test Lane		183
TR	Service Transmission	48,000	1,461

Exhibit b4
NIU Inventory of Motor Vehicles
Requested For Replacement and New
Motor Vehicle Requests

**INVENTORY OF MOTOR VEHICLES REQUESTED FOR REPLACEMENT
AND NEW MOTOR VEHICLE REQUESTS (FYBY)**

AGENCY NORTHERN ILLINOIS UNIVERSITY

FY 2011

ORGANIZATIONAL UNIT _____

TOTAL FLEET IN ORGANIZATIONAL UNIT: FY PY 232 FY CY 244 FY BY 244

1 FUND	CURRENT VEHICLE							NEW OR REPLACEMENT VEHICLE	
	2 TYPE (MODEL/YEAR)	3 VEHICLE NUMBER*	4 DATE PURCHASED OR ACQUIRED FROM D.A.S.	5 CURRENT MILEAGE AS OF 11/30	6 ESTIMATED TRADE-IN DATE	7 PRINCIPAL OPERATOR (POSITION/ ORGANIZATIONAL UNIT)	8 TYPE OF USE	9 TYPE OR CATEGORY	10 ESTIMATED COST
	Dodge Mini-Vn '93	3235*	Nov-92	100,577	Jan-11	Computer Services	Dept	Same	19,000
	Ford Hi-Cube '91	1610*	Jun-91	26,430	Jan-11	Anthropology	Dept	Same	20,000
	Dodge Ram Wgn '97	7209*	Feb-97	123,067	Jan-11	Computer Services	Dept	Cargo Van	15,000
	Dodge Stratus '00	358*	Jun-00	110,696	Jan-11	Physical Plant	Dept	Hybrid Sedan	23,000
	Dodge Caravan '98	8246*	May-98	118,883	Jan-11	Biology	Dept	Same	22,000
	Dodge Stratus '00	355*	Jun-00	103,687	Jan-11	Health Center	Dept	Hybrid Sedan	23,000
	Buick LeSabre '00	499*	Jun-00	137,405	Jan-11	Ext & Econ Dvlpmt	Dept	Hybrid Sedan	23,000
	GMC PU '95	5502*	Nov-95	57,281	Jan-11	Grounds	Dept	Same	15,000
	Dodge Cargo '95	5601*	May-95	35,436	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cargo '95	5602*	May-95	43,128	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cargo '95	5603*	May-95	38,697	Jan-11	Media Services	Dept	Same	15,000
	Dodge Cargo '95	5604*	May-95	31,669	Jan-11	Media Services	Dept	Same	15,000
	Dodge Cargo '95	5605*	May-95	41,816	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cargo '95	5606*	May-95	36,390	Jan-11	Physical Plant	Dept	Same	15,000
	GMC Cargo '95	5607*	May-95	56,475	Jan-11	Physical Plant	Dept	Same	15,000
	GMC Del Van '89	284*	May-89	77,417	Jan-11	Central Stores	Dept	Same	65,000
	Ford 4wd PU '95	5501*	Sep-95	56,196	Jan-11	Grounds	Dept	Same	20,000
	Toyota Prius '04	4435*	Feb-04	80,147	Jan-11	Police	Emergency	Same	23,000
	Dodge Caravan '02	2262*	Oct-01	141,387	Jan-11	Upward Bound	Dept	Same	22,000
	Dodge Caravan '02	2256*	Oct-01	124,461	Jan-11	Pool	Pool	Same	22,000
	Dodge Pickup '96	6501*	Dec-95	24,825	Jan-11	Physical Plant	Dept	Same	23,000
	Dodge Pickup '96	6502*	Dec-95	31,144	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Pickup '96	6503*	Dec-95	20,004	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Pickup '96	6504*	Dec-95	33,953	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Pickup '96	6505*	Jan-96	108,832	Jan-11	Physical Plant	Dept	Same	15,000
	Chev Cavalier '02	2355*	Oct-01	124,464	Jan-11	Pool	Pool	Hybrid Sedan	23,000
	Dodge Status '99	9305*	May-99	105,431	Jan-11	Heating Plant	Dept	Hybrid Sedan	23,000
	Dodge Stratus '00	357*	Jun-00	103,363	Jan-11	Pool	Pool	Hybrid Sedan	23,000
	Dodge Stratus '99	9301*	May-99	110,325	Jan-11	Building Services	Dept	Hybrid Sedan	23,000
	Dodge Cgo Van '96	6601*	Jan-96	26,548	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6602*	Jan-96	35,626	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6603*	Jan-96	21,083	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6604*	Jan-96	21,641	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6605*	Jan-96	49,603	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6606*	Jan-96	26,776	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6607*	Jan-96	35,860	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6608*	Jan-96	41,275	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6609*	Jan-96	40,705	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6610*	Jan-96	66,313	Jan-11	Physical Plant	Dept	Same	15,000
	Dodge Cgo Van '96	6611*	Jan-96	33,917	Jan-11	Physical Plant	Dept	Same	15,000
	Chev Cavalier '00	2356*	Sep-01	123,262	Jan-11	Pool	Pool	Hybrid Sedan	23,000
	Dodge Stratus '99	9303*	May-99	99,334	Jan-11	Architecture & Engineering	Dept	Hybrid Sedan	23,000
	Dodge Stratus '99	9306*	May-99	106,462	Jan-11	Materials Management	Dept	Hybrid Sedan	23,000
	Chev Cavalier '97	7307*	Apr-97	98,285	Jan-11	Parking Services	Dept	Hybrid Sedan	23,000
	Dodge Caravan '99	9232*	May-99	112,680	Jan-11	Building Services	Dept	Same	22,000
	Dodge Caravan '02	2259*	Oct-01	100,480	Jan-11	Housing	Dept	Same	22,000
	Dodge Caravan '97	7245*	Feb-97	94,212	Jan-11	Printing	Dept	Same	22,000
	Dodge Caravan '97	7244*	Feb-97	87,772	Jan-11	Human Resources	Dept	Same	22,000
	Ford 15-Pass '99	9216*	Apr-99	131,172	Jan-11	Police/Late Nite Ride	Emergency	Same	26,000

* INDICATE IF ANY OF THESE VEHICLES WERE REQUESTED FOR REPLACEMENT IN THE PREVIOUS YEAR'S ISL FORMS.

Exhibit b5
NIU Assigned Vehicle Mileage Log



Transportation Assigned Vehicle Mileage Log

Procedure No. 8-8**Issued 7/2001****I. Policy**

A mileage log is required to be maintained for all university-owned and university-leased vehicles which are "permanently" assigned to departments. The log must be used to record all off-campus travel and it is intended to be a means by which vehicle usage can be controlled. The responsibility for properly documenting the off-campus travel of permanently assigned vehicles rests with the department head.

The department head is expected to review the mileage log to determine that the vehicle has only been used for university business. A copy of the mileage log must be provided to the Transportation Department. The Transportation Department will maintain this copy of the log as the permanent record of vehicle use.

II. Procedure

The Transportation Department has created two versions of a mileage log which may be used by departments. One version is used to record only off-campus travel and the other version can be used to record all of the vehicle's trips. These forms can be obtained from Central Stores. Examples of the forms and instructions on their use are found below.

It is recognized that individual departments may have additional information needs regarding the use of departmental vehicles. In these specialized cases, the departments may use a form of their own design subject to the approval of the Transportation Department. In order to be approved the form must be used to record all off-campus travel, be used for each permanently assigned vehicle, be approved by the department head, and have one copy which is to be provided to the Transportation Department.

The mileage log is intended to be used to document the use of permanently assigned vehicles and be subsequently reviewed by the department head. The approval by the department head or designee is an affirmation that the vehicle was used only for university business. A copy of the mileage log for each permanently assigned vehicle is required to be supplied to the NIU Transportation Department at the time the monthly transportation card is returned. A mileage log must be returned even if a vehicle was not taken off-campus during a billing period.

The university's requirement that all drivers have a current and valid driver's license is applicable to permanently assigned vehicles and it is the responsibility of the department heads to ensure all their employees are in compliance.

[Off-Campus Mileage Log Form](#)

[All Travel Version Mileage Log Form](#)

Exhibit b6
NIU Materials Management
Property Control



Materials Management Property Control

Procedure No. 20-7**Revised 5/2008**

The Property Control Department, located in the Dorland Building, is responsible for insuring compliance with all applicable provisions of the State Property Control Act.

I. State Property Control Act

The purpose of the State Property Control Act, as related to movable equipment of the university, is "to safeguard the property of the State and encourage effective utilization of state-owned property." Within this framework, the President of the university is designated as the "responsible officer" under the act, and is accountable for all property to the Director of the Department of Central Management Services, State of Illinois. The President normally delegates this responsibility for the university's physical assets to department heads or fiscal officers who work with or have control over equipment assets. Information contained in this section of the Business Procedure Manual is primarily intended to assist those individuals in meeting their responsibility to the President on property control matters.

II. Definition of Equipment

An equipment item is a movable or fixed unit of furniture or furnishings, an instrument, a machine, an apparatus, or a set of articles which generally meets all of the following conditions:

- A. It retains its original shape and appearance with use.
- B. It normally has a useful life of more than two years and is non-consumable; that is, if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit.
- C. It generally represents a substantial investment of money, which makes it feasible and advisable to capitalize the item.
- D. It does not lose its identity through incorporation into a different or more complex unit or substance.
- E. All items of an equipment nature individually costing or valued at \$500.00 or more must be placed on inventory.

III. NIU Identification Tags

The Property Control Department tags furniture and equipment costing \$500.00 or more with a white bar-coded label showing a six-digit identification number and the words "Property of, Northern Illinois University." Items costing less than \$500.00 are not tagged by the Property Control Department.

The NIU tag numbers identify the items so they can be cross-referenced to the purchase order on which an item was acquired. They are applied to furniture and equipment using either a label, an indelible marking pen, or both.

When equipment consists of several pieces which are likely to be used separately, each piece shall be marked in such a manner that the identification number is not easily removed.

IV. **Inventory Reconciliation**

The State Property Control Act includes a provision that annually a physical inventory is to be made for all items and a full accounting of errors or exceptions reported to the State. Therefore, the university prepares a complete listing of all equipment each year. The lists are sent to those individuals who are accountable for the equipment and it is their responsibility to report to the Property Control Department any differences between the published list and the actual inventory. Property Control assists departments in locating missing inventory or otherwise helps to resolve any other differences. They also conduct periodic physical inventories, although primary responsibility for the equipment still rests with the fiscal officer or department head.

In addition to the annual listing, there are monthly transaction listings available to the department fiscal officer, showing equipment additions and/or deletions that have occurred during any given month. These monthly listings must be requested from Property Control, and if any discrepancies are noted, they should be promptly reported to Property Control Department.

V. **Inventory Verification After a Physical Move**

The Property Control Department will update a Department's Inventory following a physical move to another location. A list of assets will be sent to the responsible officer of that department. The responsible officer will identify those assets they wish to retain and those assets they wish to surplus. Those assets left in the old location will remain the Department's responsibility until Property Control has received proper notification that they have been transferred to another department or have been removed from that location by university movers for surplus.

VI. **Transfer of Equipment**

The Property Control Department must be contacted first when a department wishes to have assigned equipment:

- A. Transferred permanently to another department
- B. Surplused and removed from inventory
- C. Transferred from one inventory location to another
- D. Transferred from the surplus equipment pool to their inventory location

In such instances, the Property Control Department will initiate the necessary Equipment Transfer Authorization, a copy of which will be supplied to the university's movers to allow the move to be scheduled. The requesting department will also receive a copy when the university's movers complete the work.

[Equipment Transfer Form](#)

VII. **Off-Campus Use of University Property**

The private and/or personal use of university property is expressly prohibited; however, situations may arise where university responsibilities can justify the temporary use of portable equipment off-campus. The criteria for off-campus usage is more effective utilization of university resources and not the personal convenience of the employee. Approval to use equipment off-campus is obtained by completing a "Request to Use NIU-Owned Equipment Off Campus" form available from the Property Control Department, or on the Materials Management web site under Property Control. Complete this form, sign it, obtain your department head's signature, and forward two copies to the Property Control Department at the Dorland Building. When Property Control approves the request, a signed copy will be returned to the requesting department. Equipment should not be removed from campus without first obtaining an approved off-campus equipment use form.

[Request to Use NIU-Owned Equipment Off-Campus Form](#)

VIII. Surplus or Scrap Equipment

Equipment owned by the university which has become obsolete, damaged or broken, worn out, or is no longer needed by a department *should be surplusd on a timely basis.*

To surplus equipment, the department should prepare a memorandum containing the following information and send it to the Property Control Department—Dorland Building:

- A. NIU Inventory number
- B. Description (i.e., secretarial chair, Black, AllSteel)
- C. General condition or usability
- D. Reason for scrapping or surplusing
- E. The complete department name
- F. Building and Room No. where the item can be picked up
- G. A contact person's name and phone number

Property Control will then prepare an Equipment Transfer Authorization form and arrange for the item to be picked up and removed by the university movers or Grounds Department staff, and placed in the used equipment pool for reassignment within the university or eventual transfer to the State Property Control Division in Springfield.

Computer Systems with Hard Drives

State of Illinois Public Act 93-0306 effective 7/23/2003 requires that all hard drives returned with surplus computer equipment be wiped clean of all data and software by overwriting every track at least ten (10) times and certifying in writing that this process has been completed. Central Management Services and NIU Property Control will only accept completed systems that have been certified by attaching a sticker (form # 24709 available from Property Control) with the Agency name, Serial #, NIU Asset Tag #, Application used to overwrite, Name of person overwriting the disk, Date and Signature of certifier. This sticker must be applied on the upper right-hand corner of the face of the unit. Laptops must be labeled on the topside of its cover.

The software, instructions and detailed information to erase the hard drive can be found at www.its.niu.edu/downloads/wipedisk.shtml. ITS Customer Support will accept work orders to provide this service for a minimal charge.

Central Management Services further states that all of the computer equipment that belongs with the system is to be returned whole and intact. If the hard drive has been removed or is not operating and unable to be wiped clean, the certification label must state that the hard drive was removed and either drilled, crushed or shredded.

All requests for surplus computer equipment must comply with these procedures and be properly labeled before Property Control and Materials Management personnel will be able to pickup these items from the Departments.

IX. Tagging of Movable Equipment—Purchased

Purchased equipment should be unpacked and checked for damage immediately after the requesting department receives it. If the department is satisfied, it should inform the Property Control Department (753-1436) that the equipment is ready to be tagged.

X. Gifts of Equipment

Departments receiving any gift of equipment must notify the NIU Foundation of the donation and provide

that office with the following information:

- A. College and department
- B. Date the gift was received
- C. Fair Market value of the gift determined by appraisal or current market value
- D. Description of the gift
- E. From whom the gift was received

The Foundation office will notify Property Control if the gift is to be tagged and registered as State property with the Department of Central Management Services – Property Control Division in Springfield. Once tagged the equipment becomes property of the State of Illinois and Northern Illinois University, and cannot be disposed of without written authorization by the Property Control Department.

XI. **Personally-Owned Property**

University personnel who bring personal property to campus do so at their own risk. Personal property of any individual brought to university premises is the responsibility of the individual. The university can assume no liability for loss, theft, or damage. Such property should bear a note or tag showing that it is personal property and listing the owner's name. Employees desiring to protect their personal property from damage or loss should make their own arrangements for insurance.

XII. **Equipment Trade-Ins**

Equipment may be traded in for dollar credit against the purchase of new equipment if:

- A. The equipment is not needed by another university department.
- B. The proposed trade-in is approved by the Property Control Division in Springfield.
- C. The equipment to be traded is functionally similar to the new equipment being purchased.

Requests to trade-in equipment for credit on a replacement should be submitted in writing to the Property Control Department, with a copy attached to the purchase requisition submitted to the Procurement Services Department. The following information must be included with the request:

- A. Full description of the item to be traded
- B. The NIU tag number
- C. The name and address of the vendor to whom the equipment is to be traded
- D. The dollar amount to be allowed on the trade-in
- E. The cost of the new item(s)

Before the State Property Control Division in Springfield is contacted for approval, NIU's Property Control Department should obtain a purchase order number from Procurement Services to accompany the trade-in request.

If the request is approved, the details of the equipment trade-in are finalized by Procurement Services and Property Control. If the request is denied, arrangements will be made by Property Control to transfer the property as directed by the State.

XIII. **Missing or Stolen Property**

When equipment appears to be missing or stolen, a memo must be sent immediately to the university's Police Department, with a copy to the Property Control Department, indicating the NIU tag number, description of the missing items, and circumstances leading to the disappearance. If the item is later located, both the NIU Police Department and the Property Control Department must be notified.

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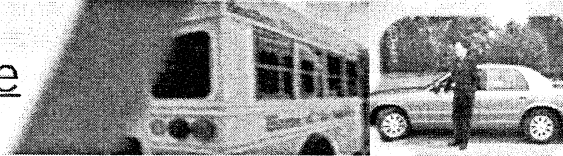
Exhibit c1
SIU Operational Policies for Take Home
and Personal Use

Plant & Service Operations

SIU Southern Illinois
University
CARBONDALE

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Operational Policies

1. Long and short-term vehicle assignment requests must originate from the requesting fiscal officer and must carry the appropriate administrative approval. All requests are subject to the approval of the director of Plant and Service Operations. Special assigned vehicles will be considered only when department needs can not be met by other available service, when the maintenance and safety of the assets of the University will be impaired, when the assignment of a vehicle represents the most economical utilization of university resources, or when it is in the best interest of Southern Illinois University Carbondale.
2. Requests for fleet vehicles must originate from the fiscal officer of the account to be charged.
3. The transportation manager will function as the control officer with vendors of motorized-wheeled vehicles used on the campus.
4. University vehicles are to be used EXCLUSIVELY for University business. Travel Service is responsible for reporting charges of misuse of University owned vehicles to the fiscal officer of the account the vehicle is assigned.
5. Southern Illinois University Carbondale Travel Service, owns and coordinates all purchases, leases, or rentals of vehicles. The processing of all purchases, leases, or rentals of vehicles is vested in the Purchasing Department. To coordinate these purchases, leases, and/or rentals, Travel Service has established the following procedure: the requesting department must submit a requisition to Travel Service signed by the fiscal officer and the immediate supervisor or vice-chancellor. Travel Service will review and forward the requisition to the Director of Plant and Service Operations for propriety and fiscal approval. After approval is gained, the requisition will be forwarded to Purchasing for processing.
6. The priority for providing service is:
 - instruction research
 - administration
 - athletics
 - student activities
7. All University vehicles must be parked on University property when not in use or away from campus, except when an assigned vehicle is required to be used for commuting purposes in accordance with specific written approval of the President. Such approval may be given only when it is determined that the duties and responsibilities of the employee frequently requires use of a vehicle for University business during times other than the normal business day. A University vehicle may not be used by the employee for personal use other than commuting.
8. The ultimate responsibility for the proper use and care of the vehicle rests with the fiscal officer who authorized its use.
9. Any deviation from state policy must be in writing.

General Information

University Automobile Insurance Coverage

All University vehicles are insured for liability coverage under the State of Illinois State Statute (20 ILCS 405/64.1). The Department of Central Management Services, Division of Risk Management/Auto Liability Section in Springfield, Illinois administers this plan. A summary of the Auto Liability Program can be found at http://www.state.il.us/cms/2_services_ben/auto/liab.htm. This coverage provides protection to the University and vehicle drivers/operators in the event of an automobile accident when the University driver/operator is deemed "at-fault" for an accident. University driver/operator must be a University employee—employee shall mean faculty, staff and student worker.

Property damage for rental vehicles is provided only if the University employee renting the vehicle is on **TRAVEL STATUS** - the term "travel status" shall mean that time during which an individual is eligible to receive reimbursement for travel expenses per rules of the Travel Control Board.

Individual drivers should be aware that using a university vehicle without permission or using a vehicle for purposes other

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- When you put 30 people in an SIUC bus, you are getting 255 mpg for every person on the bus.

than for which permission was granted, such as running personal errands or deviating from your stated travel itinerary, might result in the loss of liability insurance protection under the State Plan. The University does not carry collision/comprehensive coverage on fleet vehicles. The first \$1000 in damages per incident/accident that occurs to a University vehicle will be charged to the University department using the vehicle.

All accidents involving University vehicles and/or rental vehicles must be reported personally within **48-hours** by presenting yourself to the **Travel Service** office. If you are involved in an accident away from the University and will not be returning for several days, you may report your accident by phone. Be prepared to answer all questions related to your accident, to include, but not limited to, information on all parties involved. Travel Service personnel act as a liaison between the University driver and the Division of Risk Management-Auto Liability Unit in reporting auto accidents within the specified timeframe of seven calendar days. Failure to report accidents in the required timeframe could result in forfeiture of coverage under the State Plan for the state driver and/or agency.

If a claim is made, or suit is brought against a University driver/operator, the driver/operator shall immediately notify Travel Service office personnel to request assistance.

Please be aware that if you are using your personal vehicle while conducting University business, are involved in an automobile accident, and are deemed "at fault" for the accident, your personal automobile insurance coverage will be "primary".

Parking University Vehicles on Campus

University vehicles may be parked in any campus parking lot. Improperly parking a University vehicle is an abuse of policy and is subject to parking regulations. Parking tickets incurred for improper parking are the personal responsibility of the driver and the fiscal officer who requested the vehicle.

Automated Fueling System

For employee convenience and University cost efficiency, an automated fueling system has been installed at Travel Service. This system allows University vehicles to fuel at the garage after Travel Service hours. Each vehicle is assigned a special fueling-key and Travel Service can assign employees a fuel access code upon the request of their fiscal officer.

For more details on the use of the automated fueling system, call Travel Service at 453-3357.

Fuel Pump Information

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Exhibit c2
SIU Mileage Maintenance,
Log-in, Log-out

Plant & Service Operations

SIU Southern Illinois
University
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Long & Short-term Vehicle Assignments

Long-term Assigned Vehicles

Long-term assigned vehicles are made for periods of one year based on the University fiscal year. Annual justification is required for long-term vehicle assignments, which are under continual review.

Long-term assignment requests should include the following justification:

- purpose the vehicle is needed
- personnel who will be operating the vehicle
- time period vehicle is needed
- account number and account title vehicle charges are to be billed
- why transportation needs can not be met by other means, estimated monthly mileage
- fiscal officer signature
- campus parking lot where vehicle will be housed when not in use

All long-term assigned vehicles require the fiscal officer to submit monthly mileage reports and provide additional information as requested by Travel Service.

If the department no longer requires a long-term assigned vehicle, its assignment will be cancelled and the vehicle must be returned to Travel Service.

Short-term Assigned Vehicles

Short-term vehicle assignments are made for over 30 days and less than one year. The same vehicle justification process that is required for a long-term assignment is required for short-term vehicle requests.

Commercially Leased Vehicles

Vehicles will be leased from commercial sources only in emergencies or for programs of paramount importance to the University when no other University vehicles are available.

The procedure for scheduling a commercially leased vehicle is the same as scheduling vehicles from the daily moto pool.

Vehicles leased from commercial sources by Travel Service are governed by all general policies that regulate the operation of University vehicles.

Monthly Rental Rates

Short Term Lease (STL-over 30 and less than 365 days) or Long Term Lease (LTL-a fiscal year at a time)

	STL	LTL
Small Sedans	\$ 402.00	\$ 324.00
Mid-Size Sedans	492.00	397.00
Hybrid Small Sedans	587.00	473.00
Hybrid Mid-Size Sedans	558.00	450.00
Hybrid Small SUVs	559.00	451.00
Hybrid Mid-Size SUVs	704.00	568.00
7-passenger Vans	447.00	385.00
8-passenger Ext. Vans	454.00	366.00
8-passenger Minivans	531.00	428.00
Mini Hauling Vans	510.00	411.00
1/2-ton Hauling Vans	382.00	308.00
3/4-ton Hauling Vans	477.00	385.00

1/2-ton Pickups	346.00	279.00
1/2-ton 4x4 Pickups	443.00	357.00
3/4-ton Pickups	559.00	451.00
3/4-ton 4x4 Pickups	620.00	500.00

EXCESSIVE MILES: Mileage over 1250 miles per month will be charged at the rate of \$.10 per mile.

MAINTENANCE: Labor for routine maintenance is included. Fuel, oil, and washes are the responsibility of the department.

MONTHLY MILEAGE REPORTS: Reports are sent to the vehicle contact/Fiscal Officer each month. These reports provide departments with maintenance information. The reports must be completed and returned to Travel Service each month or vehicle use could be revoked.

INSURANCE: Above rates for University vehicles include insurance. **Departments are responsible for the \$500.00 deductible per accident.** Accidents and/or damage must be reported to Travel Service within forty-eight hours. Departments could be liable for all repairs if an accident isn't reported properly and in a timely manner.

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Preventative Maintenance Schedule

Gasoline Engines

Oil change – every 6 months or 3,000 miles

Safety inspection – every 6 months

Tire rotation – as needed

Tune up – as needed

Diesel Engines

Oil change – every 6 months or 5,000 miles

Safety inspection – every 6 months

Tire rotation – as needed

Tune up – as needed

Safety Inspections

All vehicles undergo a safety inspection every 6 months, which includes but is not limited to: Brake inspection, exhaust inspection, all fluid levels checked, all lights checked, tire inspection, shock/spring inspection, repack wheel bearings if necessary, check all glass and mirrors, wiper blades, horn, hoses, belts, heater and air conditioning systems, differential grease level, and all front end steering parts.

Exhibit c3
SIU Vehicles Over 150,000Miles

SIUC VEHICLES OVER 150,000 MILES

VEHICLE#	YEAR	MAKE	BODY	MODEL	CURRENT MILES
881	1997	FORD	PICKUP	F-250	330176
868	2005	FRTL	GRAIN	NA	307705
920	1993	FORD	TRUCK	NA	254533
843	1997	CHEV	TRUCK	1500	224181
445	1996	FORD	PICKUP	F-250	208361
524	1987	FORD	TRUCK	BRONCO	204609
580	1996	DODG	PICKUP	D-250	200201
662	1996	FORD	PICKUP	F-350	196046
588	1995	CHEV	PICKUP	TRUCK	192520
431	1990	GMC	PICKUP	C-1500	192434
703	1987	CHEV	PICKUP	FLEETSIDE	192031
711	1992	FORD	UPLINK	TRUCK	189542
564	2006	FORD	SEDAN	TAURUS	184543
409	2003	FORD	MNP/UP	RANGER	182622
415	1996	DODG	PICKUP	D-250	182320
565	2006	FORD	SEDAN	TAURUS	181872
579	1999	FORD	PICKUP	F-250	177699
089	2005	DODG	MNPVAN	CARAVAN	174882
730	1992	GMC	GRAIN	TRUCK	174685
630	2000	FORD	P VAN	ECONOLINI	173210
080	2003	GMC	PVAN	SAVANA	164598
519	1996	FORD	PICKUP	F-150	163555
451	2001	DODG	SUV	DURANGO	155221
022	2002	CHEV	HVAN	C-2500	155068
309	1992	CHEV	PICKUP	C-2500	153735
437	1998	CHEV	TONTRK	C-3500	153670
449	1996	DODG	MNPVAN	CARAVAN	153420

Exhibit c4
SIU Preventive Maintenance Schedule

Preventative Maintenance Schedule

Gasoline Engines

Oil change – every 6 months or 3,000 miles

Safety inspection – every 6 months

Tire rotation – as needed

Tune up – as needed

Diesel Engines

Oil change – every 6 months or 5,000 miles

Safety inspection – every 6 months

Tire rotation – as needed

Tune up – as needed

Safety Inspections

All vehicles undergo a safety inspection every 6 months, which includes but is not limited to: Brake inspection, exhaust inspection, all fluid levels checked, all lights checked, tire inspection, shock/spring inspection, repack wheel bearings if necessary, check all glass and mirrors, wiper blades, horn, hoses, belts, heater and air conditioning systems, differential grease level, and all front end steering parts.

Exhibit c5
SIU Fuel Pump Information

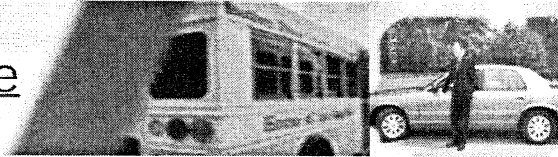
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Plant & Service Operations



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Fuel Pump Information

The fuel pumps are operational 24 hours. However, if assistance is needed in using the pumps, please come during regular working hours.

Fueling a vehicle

The automated fueling system allows University vehicles to fuel at the garage after Travel Service hours. Each vehicle is assigned a special fueling-key and some vehicles are equipped with an automated fueling device. Travel Service can assign employees a fuel access code upon the request of their fiscal officer. When driving up to the pumps to fuel the vehicle; remove the key from the ignition, insert fueling-key into pump, enter authorization code, odometer reading, and select pump number of pump being pumped from.

In Case of a Fire

If a fire does occur, **do not panic**. Do not remove the nozzle from the gas tank. Rather, back away from the car and immediately tell Travel Service or the Department of Public Safety (DPS) so they can operate the emergence shut-off switch and a fire extinguisher.

In Case of Spill

If a spill occurs, notify Travel Service immediately or (after hours) the Department of Public Safety so they can contain the spill. Refer to the next section (backsplash), if by chance you get fuel on yourself.

Backsplash

During fueling or in case of a spill and you get fuel on yourself, immediately stop the pump and see Travel Service or (after hours) DPS. In extreme cases, a shower as well as spare clothing will be provided.

Cell Phones

No cell phone use signs are posted at pumps.

Reentering a Vehicle

Do not get back in *while* you are fueling the vehicle. This can create a static buildup that will cause a spark when you touch the fuel pump. Most of the incidents of fire have been the result of the driver starting the pump, getting back into their car, and when the driver gets back out of the car to remove the nozzle, static is generated when they slide across the seat and a spark may occur when they reach for the nozzle.

Passengers

In the event that a passenger should get out of the car to operate the pump after it has been started, it is recommended that they touch a metal portion of the vehicle or the dispenser before touching the nozzle.

Fuel and Static

The above does not necessarily apply to gasoline only. The only documented cases have involved gasoline; however, diesel fuel and ethanol fuel, while such an occurrence may be unlikely, is not impossible, especially in hot weather.

Engine Running

It is **dangerous** to leave a car running when fueling. A running car presents a number of "ignition sources" for fuel vapor. The exhaust components of a modern car can literally glow red hot during normal operation.

Additional Links

News / Did you know . . .

- When you put 30 people in an SIUC bus, you are getting 255 mpg for every person on the bus.

The typical ignition system creates voltages above 40,000 volts.

But turning off your engine while refueling isn't just to prevent your car from starting a fire. There is also a safety issue in the event of fire, regardless of the source. In case a fire does occur at the fuel station a running car is danger. Imagine that fire burns through one of the rubber fuel hoses under your running car. Most fuel pumps deliver gasoline at about 15 to 40 pounds per square inch (PSI). Your fuel pump is now spraying a tremendous amount of gasoline at an open flame.

Nozzle Latches

By removing the hold-open latch the intention is to eliminate unattended fueling. Unfortunately, accidents occur when users attempt to fabricate their own makeshift latches. Placing an object, such as a gas cap, under the nozzle lever can make the cure more dangerous than the symptom.

Gas Cans

Gas cans should always be placed on the ground when filling. Never fill any portable container (regardless of material) while it is inside your car or pickup bed.

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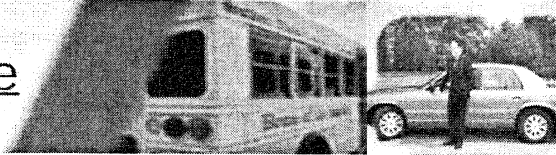
Exhibit c6
SIU New, Used Vehicles

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Operational Policies

1. Long and short-term vehicle assignment requests must originate from the requesting fiscal officer and must carry the appropriate administrative approval. All requests are subject to the approval of the director of Plant and Service Operations. Special assigned vehicles will be considered only when department needs can not be met by other available service, when the maintenance and safety of the assets of the University will be impaired, when the assignment of a vehicle represents the most economical utilization of university resources, or when it is in the best interest of Southern Illinois University Carbondale.
2. Requests for fleet vehicles must originate from the fiscal officer of the account to be charged.
3. The transportation manager will function as the control officer with vendors of motorized-wheeled vehicles used on the campus.
4. University vehicles are to be used EXCLUSIVELY for University business. Travel Service is responsible for reporting charges of misuse of University owned vehicles to the fiscal officer of the account the vehicle is assigned.
5. Southern Illinois University Carbondale Travel Service, owns and coordinates all purchases, leases, or rentals of vehicles. The processing of all purchases, leases, or rentals of vehicles is vested in the Purchasing Department. To coordinate these purchases, leases, and/or rentals, Travel Service has established the following procedure: the requesting department must submit a requisition to Travel Service signed by the fiscal officer and the immediate supervisor or vice-chancellor. Travel Service will review and forward the requisition to the Director of Plant and Service Operations for propriety and fiscal approval. After approval is gained, the requisition will be forwarded to Purchasing for processing.
6. The priority for providing service is:
 - instruction research
 - administration
 - athletics
 - student activities
7. All University vehicles must be parked on University property when not in use or away from campus, except when an assigned vehicle is required to be used for commuting purposes in accordance with specific written approval of the President. Such approval may be given only when it is determined that the duties and responsibilities of the employee frequently requires use of a vehicle for University business during times other than the normal business day. A University vehicle may not be used by the employee for personal use other than commuting.
8. The ultimate responsibility for the proper use and care of the vehicle rests with the fiscal officer who authorized its use.
9. Any deviation from state policy must be in writing.

General Information

University Automobile Insurance Coverage

All University vehicles are insured for liability coverage under the State of Illinois State Statue (20 ILCS 405/64.1). The Department of Central Management Services, Division of Risk Management/Auto Liability Section in Springfield, Illinois administers this plan. A summary of the Auto Liability Program can be found at http://www.state.il.us/cms/2_services/ben/autoliab.htm. This coverage provides protection to the University and vehicle drivers/operators in the event of an automobile accident when the University driver/operator is deemed "at-fault" for an accident. University driver/operator must be a University employee—employee shall mean faculty, staff and student worker.

Property damage for rental vehicles is provided only if the University employee renting the vehicle is on **TRAVEL STATUS** - the term "travel status" shall mean that time during which an individual is eligible to receive reimbursement for travel expenses per rules of the Travel Control Board.

Individual drivers should be aware that using a university vehicle without permission or using a vehicle for purposes other

Additional Links

News / Did you know . . .

- When you put 30 people in an SIUC bus, you are getting 255 mpg for every person on the bus.

than for which permission was granted, such as running personal errands or deviating from your stated travel itinerary, might result in the loss of liability insurance protection under the State Plan. The University does not carry collision/comprehensive coverage on fleet vehicles. The first \$1000 in damages per incident/accident that occurs to a University vehicle will be charged to the University department using the vehicle.

All accidents involving University vehicles and/or rental vehicles must be reported personally within **48-hours** by presenting yourself to the **Travel Service** office. If you are involved in an accident away from the University and will not be returning for several days, you may report your accident by phone. Be prepared to answer all questions related to your accident, to include, but not limited to, information on all parties involved. Travel Service personnel act as a liaison between the University driver and the Division of Risk Management-Auto Liability Unit in reporting auto accidents within the specified timeframe of seven calendar days. Failure to report accidents in the required timeframe could result in forfeiture of coverage under the State Plan for the state driver and/or agency.

If a claim is made, or suit is brought against a University driver/operator, the driver/operator shall immediately notify Travel Service office personnel to request assistance.

Please be aware that if you are using your personal vehicle while conducting University business, are involved in an automobile accident, and are deemed "at fault" for the accident, your personal automobile insurance coverage will be "primary".

Parking University Vehicles on Campus

University vehicles may be parked in any campus parking lot. Improperly parking a University vehicle is an abuse of policy and is subject to parking regulations. Parking tickets incurred for improper parking are the personal responsibility of the driver and the fiscal officer who requested the vehicle.

Automated Fueling System

For employee convenience and University cost efficiency, an automated fueling system has been installed at Travel Service. This system allows University vehicles to fuel at the garage after Travel Service hours. Each vehicle is assigned a special fueling-key and Travel Service can assign employees a fuel access code upon the request of their fiscal officer.

For more details on the use of the automated fueling system, call Travel Service at 453-3357.

Fuel Pump Information

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USED EQUIPMENT

Suppliers occasionally offer SIU used or demo equipment at a discounted rate.

- Requestor must initiate a Letter of Justification for the purchase of used or demo equipment listing why the purchase of used equipment would be preferable and how the purchase would be in the best interest of the University.
- Requestor submits Letter of Justification along with a **Purchase Requisition** to Procurement Services.
- Director of Procurement Services must approve all requests to purchase used equipment.
- Buyer has the option to seek competitive bids if he/she feels the University would benefit by utilizing the bid process.
- Buyer will convert Purchase Requisition into a Purchase Order.

PURCHASES BETWEEN \$5,000 - \$99,999.99

For the purchase of equipment, commodities and general services (excluding Professional and Artistic Services and Construction) under \$100,000.

Review **Procurement and Payment of Services Without a Purchase Requisition.**

This is a complete list of transactions that may be processed and payments made without a Purchase Order. If requested purchase is on this list, an **Invoice Distribution Form** may be submitted with invoice or price verification to Procurement Services for payment. Submit directly to the Foundation if utilizing a Foundation Invoice Voucher.

Please review **Categories** list for specific notes and information that apply to some purchases.

Responsible Party	Action
Department	<p>Submits information on a Purchase Requisition listing Recommended Supplier.</p> <p>Process will be expedited if Department provides a written price quotation from the Recommended Supplier.</p> <p>Note: Grant accounts must have Grant & Contract Accounting Fiscal Manager approval from Accounting Services. Foundation Accounts must have Bryan Vagner's approval.</p> <p>Department should know that purchases under the Small Purchase Maximum do not require bidding. However, due to the requirements of the Board of Trustees, Purchase Requisitions of \$10,000 to \$99,999.99 for non-professional services are encouraged to include comparative pricing. (Purchases over \$99,999.99 will require Presidential approval up to \$499,999.99 and purchases over \$500,000 will require full Board of Trustees approval after the competitive process has been completed.) Buyer may competitively bid any Purchase Requisition at their discretion.</p>

	<p>Department should be aware that a Financial Disclosure form is required for any order or subcontract over \$25,000. A Purchase Order cannot be issued until a completed Financial Disclosure has been received in Procurement Services.</p>
Requisition Control	<p>Receives Purchase Requisition and determines item number, appropriate Buyer, location and assures that Purchase Requisition has proper signatures. Also, verifies signatures (e.g. Fiscal Officer or designee, Vice Chancellor, and Chancellor).</p> <p>Sends email notification to Department Requestor with tracking number and appropriate Buyer.</p>
Supplier File Manager	<p>Verifies legal name and address of Supplier using AIS and SAMS databases. Checks for W-9.</p>
Buyer	<p>Verifies price information via email, phone, fax or mail with Supplier. Converts Purchase Requisition into a Purchase Order. Buyer will determine if order will be entered into AIS as a Standard or Planned Purchase Order.</p> <p>Sends email notification or scanned copy of Purchase Order to Department Requestor.</p>
*Central Receiving	<p>Receives and delivers tangible items to appropriate Department. Enters Departmental Receipt into AIS.</p> <p>*Applies to orders shipped to Central Receiving.</p>
Department	<p>If Department is required to pick up ordered items or Supplier delivers them directly to the Department, Requestor must enter a Departmental Receipt into AIS.</p>

	<p>If purchase order is entered into AIS as a Planned Purchase Order, the Department must enter a Release into AIS and forward the invoice to Procurement Services.</p> <p>For help in determining if a Departmental Receipt or Release is required, view this chart or call the appropriate Buyer.</p>
Procurement Services	<p>Upon receipt of an Invoice and Departmental Receipt, will issue payment to Supplier on Standard Orders.</p> <p>Upon receipt of an Invoice, will match to release into AIS and issue payment to Supplier.</p>

PURCHASES OVER \$100,000

Purchase Requisitions for \$100,000 - \$499,999.99 require SIU Presidential approval **unless** they are listed on the **Presidential Delegation Statement** to the Executive Director of Finance under the **Policies of the Board of Trustees 5C-3(c)(2)**.

Purchase Requisitions over \$500,000 require SIU Presidential approval and the entire Board of Trustees approval **unless** they are exempt by the Policies of the Board of Trustees 5C-3(c)(2). Department should allow sufficient time for this process.

NOTE: Sole source purchases and purchases subject to the competitive bid process are reviewed by the Procurement Policy Board, the State Procurement Officer, Chief Procurement Officer and the Compliance Monitor. For additional information, please see the **Procurement Policy Board Review**.

Responsible Party	Action
Department	<p>Prepares and submits Purchase Requisition and letter of justification. If sole source justification is requested, submits Sole Source Justification form also.</p> <p>Note: Grant accounts must have Grant & Contract Accounting Fiscal Manager approval from Accounting Services. Foundation Accounts must have Bryan Vagner's approval.</p> <p>Department should know that purchases over the Small Purchase Maximum require formal comparative pricing or sole source justification.</p> <p>Department should provide sufficient specifications to permit development of a Request for Quotation or Request for Proposal.</p> <p>For sample letters of justification see Presidential Letter Requirements. (completed by Procurement Services)</p> <p><u>Insurance Requirements for RFQ/RFP</u> Prior to sending the Purchase Requisition and Request for Quotation/Request for Proposal to Procurement Services, please contact Risk Management to determine if insurance is required and what the limits should be. Any information obtained from Risk Management must be in writing and forwarded to Procurement Services with the Purchase Requisition and Request for Quotation/Request for Proposal.</p>

Department submits a listing of Suppliers that should receive a copy of the Request for Quotation/Request for Proposal. Buyer, at their discretion, may solicit additional Suppliers.

All requests over the Small Purchase Maximum must be advertised for a minimum of 15 days on the **Illinois Public Higher Education Procurement Bulletin**. Department must plan purchases in consideration of the additional time that will be needed to process these transactions due to the advertising requirement.

Specifications submitted should not be proprietary or otherwise unduly restrictive. Specifications cannot be photocopied or otherwise identical reproductions or drafts prepared by a potential bidder. Failure to provide adequate specifications with a Purchase Requisition will cause additional delay in processing the transaction.

Intent to purchase on a sole source basis must be advertised on the IPHEC Procurement Bulletin at least 15 days and a public hearing will be held in Springfield for input from any interested parties.

Department must submit a Sole Source Justification form that is detailed and sufficient enough to withstand a challenge by others. A difference in price between potential Suppliers, in and of itself, is not justification for a sole source purchase.

Department should consider that if a challenge to a requested sole source procurement is found to be warranted, the purchase transaction may be withdrawn as a sole source and will be handled under a Request for Quotation/Request for Proposal solicitation process resulting in further delay in completing the transaction.

Posting an intent to make a purchase, as a sole source on the IPHEC Procurement Bulletin will provide increased exposure, which could result in a challenge of this method of selection by other Suppliers.

The Director of Procurement Services must approve all requests for sole source justification.

	<p>Note: Emergency Purchases on Purchase Requisitions more than the Small Purchase Maximum as required by the Illinois Procurement Code are permitted in case of: threat to public health or safety, to protect against loss of or damage to State property; to prevent or minimize disruption in State services; or to ensure integrity of State records.</p>
<p>Requisition Control</p>	<p>Receives Purchase Requisition and determines item number, appropriate Buyer, location and assures that Purchase Requisition has proper signatures. Also, verifies signatures (e.g. Fiscal Officer or designee, Vice Chancellor, and Chancellor).</p> <p>Sends email notification to Requestor with tracking number and appropriate Buyer.</p>
<p>Buyer</p>	<p>Receives Purchase Requisition and letter of justification.</p> <p>Converts Purchase Requisition and specifications into a Request for Quotation or Request for Proposal and advertises on the IPHEC Procurement Bulletin.</p> <p>Solicits bids from various Suppliers to be opened on a determined bid date.</p> <p>Opens bids and makes award recommendation to end-user. Department must provide sufficient back-up justification and documentation when the lowest bidder by price is not being selected since the decision and justification for making an award must be advertised on the IPHEC Procurement Bulletin.</p> <p style="text-align: center;">or</p> <p>Buyer will confer with Director on sole source justification. If Director approves this source selection, Buyer will post on IPHEC Procurement Bulletin and verify pricing via email, fax, phone or mail and secures any required paperwork, such as Financial Disclosure, Certificate of Insurance, etc.</p> <p>Following the competitive procedures, reviews materials and prepares Presidential Letter for the Chancellor. Submits materials to the Chancellor's Office.</p>

	<p>If award is \$500,000 or more, buyer or PSO (construction related awards) prepares Board Matter with assistance from requesting department.</p> <p>NOTE: Certain Purchase Requisitions as described under the Policies of the Board of Trustees 5 C-3(c)(2) are sent directly to the President's Office or his designee.</p>
SIU Chancellor	If applicable, signs letter and Purchase Requisition to recommend approval and forwards to the Office of the President.
SIU President's Office	If less than \$500,000, reviews purchase recommendation and approves purchase. Returns original materials to Procurement Services.
SIU Board of Trustees	If \$500,000 or more, reviews award recommendations and approves purchase.
SPO/CPO	The State Procurement Officer (SPO) will review the decision of the award for competitive solicitations and publish the award, Financial Disclosure, and the vendor's agreement to university certifications on the IPHEC Procurement Bulletin. The Chief Procurement Officer (CPO) will publish the same information for sole source procurements above the Small Purchase Maximum on the IPHEC Procurement Bulletin.
Buyer	<p>Buyer will determine if order will be entered into AIS as a Standard or Planned Purchase Order.</p> <p>Sends email notification or scanned copy of Purchase Order to Department Requestor.</p>
*Central Receiving	<p>Receives and delivers tangible items to appropriate Department. Enters Departmental Receipt into AIS.</p> <p>*Applies to orders shipped to Central Receiving.</p>
Department	<p>If order is a pick-up or delivered directly to the Department, Requestor must enter a Departmental Receipt in the AIS.</p> <p>If purchase order is entered into AIS as a Planned Purchase Order, the Department must enter a Release into AIS and forward the invoice to</p>

	<p>Procurement Services.</p> <p>For help in determining if a Departmental Receipt or Release is required view this chart or call the appropriate Buyer.</p>
<p>Procurement Services</p>	<p>Upon receipt of an invoice and Departmental Receipt, will issue payment to Supplier on Standard Orders.</p> <p>Upon receipt of an invoice on Planned Orders, will match to Release in AIS and issues payment to Supplier.</p>

Exhibit c7
SIU Single Vehicle Purchases

SIUC SINGLE VEHICLE PURCHASES

VEHICLE#	YEAR	MAKE	MODEL
062	2011	Chevrolet	Impala
068	2010	Ford	Fusion
082	2011	Chevrolet	Impala
098	2010	Ford	Fusion
120	2011	Chevrolet	Impala
137	2011	Ford	F250 Pickup
373	2011	Toyota	Camry
442	2011	Chevrolet	Silverado Pickup
600	2008	Chevrolet	Bus

Exhibit c8
SIU Vehicle Trade Policy

Southern Illinois University
Vehicle Trade Policy
January 1, 1998

Vehicles will normally be traded only after being driven for 100,000 miles or after 10 years in use.

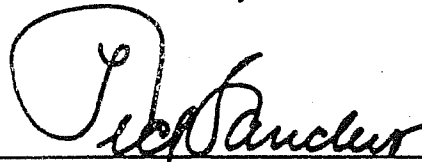
Vehicles which continue to be safe and economical to maintain will be kept in service longer than 100,000 miles or 10 years.

On occasion, vehicles with less than 100,000 miles or 10 years service will need to be traded. (A trade of this nature will require the approval of the Vice Chancellor for Administration.)

Reasons for this include:

- Vehicle has become unsafe to operate.
- Vehicle's cost of maintenance has risen to the level that makes it more economically prudent to replace the vehicle than to continue to operate it.
- Vehicle purchased and used as a police cruiser will normally be traded after 75,000 miles or 2 years in use.

Approved: _____



President Ted Sanders
Southern Illinois University

Exhibit c9
SIU FY11 Total Expenditure

The total SIUC expenditure for FY2011 was \$3,996,997 broken down as follows:

Acquisitions - \$532,071

Repair body and accident damage \$128,582

Maintenance – oil changes and routine repairs \$539,060

Operate – Depreciation, fuel, comp/collision insurance, vehicle rentals \$2,797,284

Exhibit d1
UIUC Take Home, Personal Use

1. Provide a copy of your agency/university take home or personal use policy.

The University's entire "Use of University Vehicles" policy is copied at the end of this document. Sections specific to take home or personal use include:

"Personal Use of University Motor Vehicles

Personal Use Is Forbidden

Personal use of University motor vehicles is prohibited and will not be tolerated. De minimis personal use, such as stopping for lunch between business trips, reasonable deviation from the direct route to reach hotels, restaurants, etc., during the normal course of conducting University business, is an extension of business use and is not considered personal use. Examples of inappropriate use would include, using a University motor vehicle for shopping, entertainment, recreation, or vacation purposes unrelated to University business.

Commuting to and from home is prohibited. However, employees may use University motor vehicles between their home and place of work if, for example, they are beginning or ending a trip at home, due to the hour of arrival or departure.

Exceptions for Pre-Approved Commuting

Exceptions may be granted to allow commuting to and from home, only under specific circumstances and for legitimate, non-compensatory business reasons, where the University requires the employee to commute to and from work in a University motor vehicle. The reasons for such use must be documented and approved by the President, Comptroller, or Chancellors. No personal use of these University motor vehicles is permitted. However, recognizing that there could be a situation, such as a medical emergency, when an individual must use the assigned University motor vehicle for what the State would deem "personal use," the individual must look to his or her personal automobile insurance carrier, to obtain protection in the form of an "extended, non-owned automobile liability endorsement." To comply with State guidelines, these individuals must also submit a Vehicle Insurance Certification for Employees Authorized to commute form annually, along with a certificate of insurance evidencing the required coverage."

Exhibit d2
UIUC Mileage, Maintenance

2. Provide a copy of your agency/university mileage/maintenance/log in, log out policy.

The University's entire "Use of University Vehicles" policy is copied at the end of this document. Sections specific to mileage/maintenance/log in, log out, include:

"Fleet Management

Passenger vehicles may be assigned to an employee for a specific trip, or to a campus Unit on a long-term or permanent basis, with authorized funding, written justification, and unit approval. The continuing need for a passenger vehicle that has been assigned on a permanent basis is subject to annual review. The campus unit authorizing the use of the passenger vehicle is charged by mileage and/or time for use of the passenger vehicle. The rate charged is based on the actual operating, maintenance, and depreciation costs of the fleet.

If a campus unit requires the use of a fleet or motor pool vehicle for daily or short-term rental, the department must complete and submit a signed Car Release Order (UIC/UIUC; or UIS).

- At UIUC, the form can be downloaded by employees who have department authorization to use the [UIUC Car Pool website](#) (an F&S user account and password are required).
- For additional information, contact the UIUC Car Pool at 217-333-3910.

The Car Release Order form authorizes the appropriate campus office to release a passenger vehicle for a specific purpose and length of time. The Unit that originally issued the Car Release Order must authorize any extension request, and that unit must notify The Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) of the approved extension. If the Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) are not notified of a cancellation of a trip reservation, the unit may be subject to an additional charge.

The Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) will inspect the driver's licenses of all authorized drivers shown on the Car Release Order (see Driver Requirements: Eligibility to Drive University Motor Vehicles). Alternate drivers (any authorized driver in addition to the primary driver whose name is listed on the Car Release Order) must complete and submit a signed [Alternate Drivers Car Release](#). Drivers who do not qualify to operate a University motor vehicle are denied use.

Expenses of operation

Details may vary by campus, but in general, when a motor vehicle is operated in a city served by a campus car pool office, that campus car pool office must furnish all gasoline, oil, service, and repairs. When a motor vehicle is operated outside a city served by a campus car pool office, the credit card furnished with the motor vehicle should be used for the purchase of:

- Gasoline, oil, and lubrication service;
- Tire and battery service;
- Vehicle washing on extended trips; and,
- Cost of repairs under \$50.

Copies of all credit receipts must be given to the appropriate campus car pool office. The campus car pool office will reimburse necessary cash purchases, if a receipt is submitted.

For emergency repairs more than \$50, call the appropriate campus car pool office to find out what should be done. If the campus car pool office is closed, call the University Police for guidance. Campus car pool offices and the University Police will accept Collect Calls if necessary.”

Exhibit d3
UIUC Fuel, Maintenance

3. Provide a copy of your agency/university fuel, maintenance and inspection policy.

The following policy is copied from the University of Illinois at Urbana-Champaign's *Campus Administrative Manual*:

Department-Owned Non-Passenger Vehicles and Equipment

Purpose

This policy governs the purchase, use, and maintenance of non-passenger vehicles and equipment at the University of Illinois.

Scope

The University's threefold mission of teaching, research, and service to the people of Illinois requires that certain non-passenger vehicles and equipment (as defined below) be available for use by faculty, staff, and other authorized personnel.

Authority

This policy is implemented under the authority of the Office of the Executive Director of Facilities & Services.

Policy

Departments on the Urbana campus are required to coordinate the purchase of non-passenger vehicles and equipment with the Transportation and Automotive Services unit of Facilities & Services. Departments are required to follow established procedures for the purchase, use, and maintenance of non-passenger vehicles and equipment.

Definitions

- **Second Division Vehicles**

Vehicles designed to carry more than 10 persons, those designed and/or used for living quarters, and those designed for pulling and/or carrying freight or cargo, including trucks, trailers, sport utility vehicles, buses, scooter-vans, or any other such vehicle used for hauling materials.

Processes/Procedures/Guidelines

Appropriate Use of University Vehicles

University vehicles can be used only for official University business, regardless of ownership. Drivers of University vehicles must be able to prove they are licensed to drive in the State of Illinois. Department-owned University vehicles may be used only by personnel authorized by the unit head/dean.

While University passenger vehicles are owned by the Car Pool and maintained by the University Garage, campus units may purchase non-passenger vehicles using their own departmental funds. These units are then responsible for the care and maintenance of those vehicles. Department-owned vehicles, like all other University vehicles, are property of the State of Illinois.

Purchasing Department-owned Vehicles

Units that purchase departmental vehicles using their own funds must follow all State of Illinois Compiled Statutes [Procurement Code](#), the State of Illinois [Administrative Code](#), and University Purchasing Division [policies, procedures, and rules](#) pertaining to bid limits, the competitive bid process, price negotiation, and contracts processing.

In all cases, the Director of Transportation and Automotive Services must receive a copy of each vehicle Purchase Order. The Campus Garage accepts initial delivery of all vehicles and assigns each a unique Fleet Number. Garage personnel also

1. establish a master file for the vehicle;
2. ensure the vehicle is properly titled and licensed with University plates;
3. establish an annual service schedule for the vehicle if requested;
4. assign University PAS tag; and,
5. obtain any other vehicle identification required by the State of Illinois.

Annual Vehicle Maintenance Requirements for Department-owned Vehicles

All expenses for upkeep and operation of department-owned vehicles, including accident repair costs, are the responsibility of the unit/department. The State of Illinois requires that all state-owned (University-owned) vehicles receive routine service at least once a year, regardless of mileage driven or hours utilized. The Department of Central Management Services (DCMS) states that such service is required, "in order to maintain the vehicles in road worthy, safe operating condition, and appropriate cosmetic condition." Department-owned vehicles may be serviced by the Campus Garage or an outside vendor (Purchasing Division rules apply).

When an outside vendor performs any type of service or repair to a department-owned University vehicle, copies of the receipts for the service or repair must be sent to the Campus Garage, including receipts for annual routine maintenance. All receipts are added to the vehicle's master file at the Garage, and provide auditable evidence of compliance with State of Illinois requirements.

Safety Inspection of Vehicles in the Second Division

Second Division Vehicles are defined as those designed to carry more than 10 persons, those designed and/or used for living quarters, and those designed for pulling and/or carrying freight or cargo. The State of Illinois by law places the responsibility for safety inspections of Second Division Vehicles on the driver of the vehicle: "No person shall operate a second division vehicle ... unless there is affixed ... a certificate of safety then in effect."

For purposes of implementation on the UIUC campus, it is the responsibility of the dean, director, or head of each unit (or the designee of such unit) to have each of the Second Division Vehicles checked for safety every six months.

All motor Vehicles of the Second Division must be submitted to a safety inspection and must be granted a certificate of safety prior to being driven on Illinois highways.

All vehicles to be inspected must, after following the required purchasing procedures, be taken to the nearest State Safety Inspection Center. If repairs are needed for the vehicle to pass the inspection, Campus Garage personnel can make those repairs.

All Vehicles of the Second Division that have passed an inspection will have a sticker affixed to the windshield indicating when the next inspection is due. The police will ticket Vehicles of the Second Division with an invalid sticker.

Contact

Questions or requests for exceptions to this policy should be directed to the Director of Transportation and Automotive Services, (217) 333-7583.

Date Issued: December 22, 1999

Date Revised: August 23, 2012

Exhibit d4
UIUC Vehicle Procurement

4. Provide a copy of your agency/university new/used vehicle procurement policy.

Facilities and Services has the following planned replacement cycle for their vehicles. For vehicles owned by other departments, there appears to be no specific replacement policy that applies. Essentially each department is permitted to replace vehicles when desired in the way that is desired, as long as they are in compliance with policies (State laws) that govern the types of vehicles that are purchased (alternative fuels, etc.)

1. The general rules for vehicle replacement are:

October 5, 2012

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Trucks:	10-15 years
Sedans:	5 years or 80,000 miles
Mini-vans:	5 years or 65,000 miles
Vans and SUVs:	8 years or 115,000 miles

Exhibit d5
UIUC Vehicle Disposal

5. Provide a copy of your agency/university vehicle disposal policy.

All University vehicles are traded in on new purchases as allowed by State law (copy follows):

TITLE 44: GOVERNMENT CONTRACTS, PROCUREMENT AND PROPERTY MANAGEMENT
SUBTITLE D: PROPERTY MANAGEMENT
CHAPTER I: DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
PART 5010 MARKING, INVENTORY, TRANSFER AND DISPOSAL OF STATE-OWNED
PERSONAL PROPERTY
SECTION 5010.1100 DISPOSAL OF STATE-OWNED VEHICLES

Section 5010.1100 Disposal of State-Owned Vehicles

These rules apply to the disposal of all State-owned vehicles, except those traded in to a dealer for replacement vehicles and those vehicles under the jurisdiction of State colleges and universities.

The University is also providing a copy of our policy regarding disposal of unneeded equipment:

Business and Financial Policies and Procedures
Section 12 – Property Accounting

Dispose of Unneeded Equipment

Before You Begin

No one is permitted to remove from the buildings and grounds any property belonging to the University without approval, even though the equipment may appear to be of no value, unless all relevant policies and procedures are followed. This includes removal of property designated as scrap or recycling and applies to all unneeded equipment regardless of historical cost, tagging status, or inclusion in Banner Fixed Assets. Units are responsible for paying any costs associated with the disposal of equipment.

Begin

To dispose of unneeded equipment:

1. Consult Banner Fixed Assets to confirm that your unit is on record as the responsible organization for the equipment and that it is titled to the State of Illinois. If the equipment is owned by a project sponsor, obtain approval for disposal from your campus Grants and Contracts office. Follow the remaining steps even if the equipment is not in Banner Fixed Assets.
2. Secure the equipment until this procedure is complete as you are responsible for it until custody has been transferred.
3. Identify all hazardous materials and follow your campus procedures for their removal.
4. Examine the item to assess its condition. Decide whether it should be classified as scrap or surplus.
5. If you are at the Springfield campus and the equipment is a computer, use FABweb to transfer the item to UIS Information Technology Services. They will wipe the data. If the computer cannot be used elsewhere, they will proceed with the disposal process.
6. Complete a surplus/disposal transaction in FABweb.
7. If the equipment is electronic equipment with memory/integrated circuitry:
 - Remove the data from the equipment (scrub).
 - Affix a Scrub Label to the front of the item to certify that you have removed the data.
 - On the label, check:
 - "Degaussed" if the data was degaussed (which leaves the data in random patterns and therefore unrecoverable according to federal requirements)
 - "Overwritten" if the data was overwritten
 - "Inoperable Device" if the device is inoperable and cannot run data elimination software
 - Do not remove the hard drive or other components. If the Scrub Label is missing, you may be charged for the cost of eliminating the data or the equipment may be returned to you at your expense.
8. Cancel or modify any maintenance contracts related to the equipment. If the item was insured, contact the University Office of Risk Management.
9. Use FABweb to forward the transaction to your unit approver, who will approve and forward it to University Property Accounting and Reporting (UPAR). When you receive the e-mail from UPAR approving the disposal, forward that approval to your campus Facilities office so they can remove the equipment.
10. Each campus has a different process for removing equipment from units: Urbana – A property inspector will come to your unit to inspect the equipment and make arrangements to transfer it to your campus surplus warehouse. Chicago – Submit a service request to the Facilities Management Service Desk to transfer the equipment to your campus surplus warehouse.
Springfield – Building Services receives the approved disposal request form from UPAR and will initiate transportation of your equipment.

Off-campus Locations – Take the equipment to the closest campus surplus warehouse.

11. Four weeks after submitting the request, verify that the chart and organization for the asset has been changed to the surplus warehouse in Banner Fixed Assets.

Other Disposals

Equipment can also be traded in when purchasing new equipment. Document the trade in on all purchasing documents. Complete a surplus/disposal transaction in FABweb to remove the equipment from your inventory.

With appropriate approvals and under certain conditions set forth by the State Department of Central Management Services, equipment purchased with restricted, sponsored research funds may be eligible for exemption from State property disposal rules. Contact your campus Grants and Contracts office for more information.

On rare occasions it may be possible to dispose of equipment by sale, donation, or transfer to another state agency provided UPAR and the State of Illinois have given approval before the disposal.

Collection items may not be disposed of without approval from UPAR. Proceeds from the sale, exchange, or other disposal of any item belonging to a collection of works of art or historical treasures must be applied to the acquisition of additional items for the same collection. Proceeds may not be used to support operating costs, whether directly related to the collection or otherwise.

Before equipment is used only for its component parts (cannibalization), complete a surplus/disposal transaction in FABweb. If UPAR agrees that only the component parts are usable, you will be authorized to remove the usable parts and scrap the remainder. If any surviving part(s) should be inventoried, report the remaining asset as a non-cash addition using FABweb.

Related Policies and Procedures

[Remove Data from Electronic Devices](#)

Additional Resources

[FABweb Transfers and Disposals Participant Guide](#)

Urbana

[Facilities and Services](#) 


Chicago

[Facilities Management Service Desk](#) 

Springfield

[Facilities Scheduling and Services](#) 

[Disposal of Electronic Equipment at UIS](#) 

[UIS Equipment Transfers and Disposals Procedures](#) 
Scrap and Surplus in Definitions”

Last Updated: June 1, 2011

Exhibit d6
UIUC Business and Financial
Policies and Procedures

Business and Financial Policies and Procedures

Section 15.3 - Use of University Motor Vehicles

Date: July 2009

Approved: Senior Associate Vice President for Business and Finance

Policy Statement

This policy applies to the use of University motor vehicles by University employees. The purpose of the policy is to:

- Help ensure the safe operation of University motor vehicles.
- Help ensure that University motor vehicles are driven only in accordance with University policy.
- Provide units with clear information regarding University policy.
- Help ensure the safety of drivers and passengers.
- Help minimize uninsured losses, damages, and claims.

Who May Drive University Motor Vehicles

In accordance with Chapter 1, Section 5040.350 of the Illinois Administrative Code, University motor vehicles shall be used only for public purposes and in the best interest of the State, and when authorized in writing by the President, or designee, in accordance with this policy. **The President has authorized the following individuals to drive University motor vehicles, in accordance with University and State policies:**

- Full-time and part-time employees of the University, including student employees operating a University motor vehicle as a part of their University employment duties.
- Students who are designated as official representatives of the University, but only as necessary to perform official University responsibilities. Examples include legislative hearings, Board of Trustees meetings, meetings of the State Board of Higher Education, and similar meetings.
 - Students are not authorized to drive a University motor vehicle if they do not fall into the above-referenced categories.
- In limited circumstances, individuals who are not University employees, but only when working at the direction of, and for the benefit of, the University, and as authorized in writing, in advance, by the President or designee.

Student organizations cannot authorize the use of University motor vehicles. Departments may not authorize the use of University motor vehicles on behalf of a student organization, without *prior written approval* of the Senior Associate Vice President for Business and Finance and/or the Chancellor's representative (see [Procedure to Request Exceptions](#)). If approval is obtained, a commercially-insured motor pool vehicle must be reserved, to ensure commercial liability protection. In all cases, vehicle use should be for the benefit of the University, and must be driven by an employee or student employee.

Delegation of Authority

The President has delegated authority for decisions regarding appropriate use of University motor vehicles to the Comptroller and/or Chancellors. The Comptroller and each Chancellor has further delegated authority, to the Senior Associate Vice President for Business and Finance and Chancellors' representative. Under no circumstances are unit heads allowed to authorize the use of University motor vehicles outside of the scope of authorized use.

The Senior Associate Vice President for Business and Finance or Chancellors' representative may be petitioned to modify the existing policy on vehicle use, and, in consultation with other University and campus administrators, make decisions regarding authorized use within established guidelines, or additions/deletions to the list of approved uses (see [Procedure to Request Exceptions](#)).

Driver Requirements: Eligibility to Drive University Motor Vehicles

Failure to comply with the procedures set forth in this policy will result in disciplinary action in accordance with established University policy, and may result in suspension or termination of University motor vehicle operating privileges.

Operation of a University motor vehicle is based on an employee's ability to meet the requirements and follow the procedures listed below:

1. Employees must possess and present a valid driver's license issued in their state of residence. The driver's license must be appropriate for the type of University motor vehicle that the employee is authorized to drive. New Illinois residents may drive with a valid out-of-state, or valid foreign driver's license, for 90 days, after which time the individual must obtain an Illinois license. (An international driver's license, accompanied by a valid foreign driver's license, is acceptable.)

Employees or student employees who have not declared Illinois as their state of residence may drive on a valid out-of-state or foreign driver's license.

2. Employees must agree to operate University motor vehicles in accordance with applicable State and Local laws, and University regulations.
3. When using a department motor vehicle, and/or a car/motor pool vehicle assigned on a long-term basis, employees must complete and submit a signed [Departmental Driver Approval](#).

4. When using a vehicle from the car/motor pool fleet for daily or short-term rental, employees must complete and submit a signed Car Release Order for their campus.
 - Urbana employees may download the form from the Car Pool website if they have department to access the [Facilities and Services portal](#). Contact the Car Pool at (217) 333-3910 for information about portal access.
 - Chicago employees must complete a pre-printed, multi-part version of the form, which is available at the bookstore. Contact the Transportation Facility at (312) 996-2842 for details.
 - Springfield employees may use the [Car Release Order - Springfield](#).
5. Alternate drivers (any authorized driver in addition to the primary driver whose name is listed on the Car Release Order form) must complete and submit a signed [Alternate Drivers Car Release Certification form](#).

Note:

In instances when the Senior Associate Vice President for Business and Finance or Chancellors' representative has extended the privilege of driving a University motor vehicle to a non-employee, that individual must comply with the eligibility requirements shown above. It is the Unit's responsibility to ensure that the individual completes a Departmental Driver Approval form under the same conditions as if the individual was a University employee. The Unit is also responsible for viewing the individual's actual (physical) driver's license, to ensure the license is current and valid. If the individual cannot produce a valid and current driver's license, he/she will not be allowed to use a University motor vehicle.

Further:

- The University prohibits drinking of alcoholic beverages and/or the use of controlled substances at any time while operating a University motor vehicle. The driver of the motor vehicle must not be under the influence of controlled substances and/or alcohol at any time;
- All traffic violations and citations are the sole responsibility of the driver;

and,

- In the event of an accident or damage to the University motor vehicle, the driver must report the incident to his/her campus transportation facility within two calendar days of the event.

To meet policy objectives, the University reserves the right to review the licenses and driving records of all drivers of University motor vehicles. Eligibility to operate a University motor vehicle as defined in this policy may be dependent upon a prospective driver's driving record.

All drivers of University motor vehicles must comply with the applicable State driving laws and regulations, and University policies concerning the operation of motor vehicles.

Loss of Driving Privileges

The following offenses, in accordance with Section 3100.500 of the Illinois Administrative Code, will result in suspension or termination of University motor vehicle driving privileges, along with appropriate disciplinary action.

1. Operating a motor vehicle without a valid driver's license;
2. Failure to report the suspension or revocation of his/her driver's license;
3. Failure to obey University policy with regard to appropriate business use of the University motor vehicle, and/or failure to obey State and Local traffic regulations;
4. Operating a University motor vehicle for personal use; and,
5. Failure to report a motor vehicle accident that involves bodily injury, and/or the damage or destruction of University property, or the property of others.

Appropriate and Approved Use of University Motor Vehicles

Pre-Approved Use

University motor vehicles shall be used only for public purposes in the best interests of the State. When performing employment duties on behalf of the University, authorized uses include:

- Travel between places of University business, places of temporary lodging, places to obtain meals, and/or other locations necessary to perform University employment-related duties;
- Operation of a University motor vehicle when on a travel-related assignment (including, but not limited to, pick-up and return of a vehicle and necessary commuting);
- Operation of a University motor vehicle for University of Illinois Foundation and/or Alumni Association staff, when the activity is a direct functional purpose serving the University Mission, and such activity is within the job description of the person(s) using the vehicle;
- Any other use when for public purposes and in the best interests of the University, and authorized in writing by the President or designee;

- Individuals who may be required to commute to/from their place of employment. The reasons for such use must be documented and approved annually by the Comptroller; and
- Transport of individuals as described below.

Individuals who may be transported within a University motor vehicle, driven by an employee, or driven by a non-employee who has written approval of the Senior Associate Vice President for Business and Finance or Chancellors' representative, include:

- Participants of the University's public engagement, teaching, research, and medical research programs, including to/from the site of the planned activity/event;
- University students and University High School students, when related to the University's public engagement, teaching, research, and medical research programs, including to and from the site of the planned activity/event;
- Shuttle service to the Springfield campus, for students attending night classes/programs (due to lack of mass transit availability);
- Campus shuttle and commuter bus service provided exclusively for University faculty, staff, and students;
- Passengers in University police vehicles, related to official University police business;
- Recruits to the University (for example, job applicants, athletic and faculty recruits, including their family members);
- Performers/guests of the University, including but not limited to, faculty, members of peer institutions, researchers, etc., including their family members;
- University Board of Trustees members, their guests, and family members;
- Donors or potential donors, their guests, and family members; and,
- Students participating in official events and practices, including to/from the site of the planned activity, such as athletics and band.

Commercial Insurance for University Motor Vehicles

There may be certain recreational uses, and other selected uses of University motor vehicles, that the University deems appropriate, but that will not be covered by the liability insurance provided by the State of Illinois Plan. In instances where there is uncertainty as to whether a proposed use is covered by the liability insurance provided under the State of Illinois Plan,

commercially-insured motor vehicles should be used. All University policies and procedures are still applicable with regard to the individuals who are authorized to drive University motor vehicles, as well as the prohibition regarding personal use.

Pre-Approved Use of Commercially-Insured University Motor Vehicles

Circumstances under which the University deems University motor vehicle use is appropriate, but which may be declined for coverage by CMS include:

- Intramural Sports, including travel to/from a scheduled event/activity;
- Campus Recreation outdoor programs, including travel to/from the planned event/activity;
- Family Housing and Graduate community educational programs, children's pre-school, and after school planned educational activities/field-trips; however, when children (through high school age) are being transported, the use of vehicles is limited to travel within Urbana-Champaign and Savoy, and visits to/from Allerton Park;
- Transporting participants of University-sponsored academic and sports camps, but only for activities and events directly related to the camp; however, when children (through high school age) are being transported, the use of vehicles is limited to travel within Urbana-Champaign and Savoy, and visits to/from Allerton Park; and,
- Department-authorized use by a Registered Student Organization, upon written approval by the Senior Associate Vice President for Business and Finance or Chancellors' representative.

Units should contact the Transportation Facility to reserve a "covered fleet" motor vehicle. Covered fleet motor vehicles are commercially insured. Special use of University motor vehicles must be carefully monitored to ensure that commercial automobile liability insurance is in place, to provide coverage for these special activities, since the CMS may decline automobile liability coverage.

Unauthorized Use

Unauthorized use of a University motor vehicle includes, but is not limited to:

- Transportation for shopping, meals, entertainment, recreation, or vacation purposes unrelated to the performance of University employment duties;
- Transport of any person for any purpose unrelated to University business (see above list for persons who may be passengers in University motor vehicles); and
- Transport of materials, equipment, supplies, tools, parcels, luggage, or other items unrelated to the performance of University business.

Student organizations cannot authorize the use of University motor vehicles. Departments may not authorize the use of University motor vehicles on behalf of a student organization, without prior written approval from the Senior Associate Vice President for Business and Finance or Chancellors' representative (see [Procedure to Request Exceptions](#)). If approval is obtained, a commercially-insured motor pool vehicle must be reserved, to ensure there is commercial liability protection. In all cases, the motor vehicle use should be for the benefit of the University, and must be driven by an employee or student employee.

Personal Use of University Motor Vehicles

Personal Use Is Forbidden

Personal use of University motor vehicles is prohibited and will not be tolerated. De minimis personal use, such as stopping for lunch between business trips, reasonable deviation from the direct route to reach hotels, restaurants, etc., during the normal course of conducting University business, is an extension of business use and is not considered personal use. Examples of inappropriate use would include, using a University motor vehicle for shopping, entertainment, recreation, or vacation purposes unrelated to University business.

Commuting to and from home is prohibited. However, employees may use University motor vehicles between their home and place of work if, for example, they are beginning or ending a trip at home, due to the hour of arrival or departure.

Exceptions for Pre-Approved Commuting

Exceptions may be granted to allow commuting to and from home, only under specific circumstances and for legitimate, non-compensatory business reasons, where the University requires the employee to commute to and from work in a University motor vehicle. The reasons for such use must be documented and approved by the President, Comptroller, or Chancellors. No personal use of these University motor vehicles is permitted. However, recognizing that there could be a situation, such as a medical emergency, when an individual must use the assigned University motor vehicle for what the State would deem "personal use," the individual must look to his or her personal automobile insurance carrier, to obtain protection in the form of an "extended, non-owned automobile liability endorsement." To comply with State guidelines, these individuals must also submit a [Vehicle Insurance Certification for Employees Authorized to commute form](#) annually, along with a certificate of insurance evidencing the required coverage.

Tax Reporting for Pre-Approved Commuting Use of University Motor Vehicles

The University accounts for pre-approved commuting use of University motor vehicles by calculating and including the appropriate amount in an employee's gross income on Form W-2. In compliance with Federal Treasury Regulation §1.61-21(d), the University calculates the employee's taxable portion by applying the automobile lease valuation rule, which assigns an annual lease value [determined by the Internal Revenue Service under Federal Treasury

Regulation §1.61-21(d)(2)] to the motor vehicle, depending on its fair market value as of the first date the motor vehicle is made available to the employee, for pre-approved commuting use. The annual lease value includes the fair market value of maintenance of the motor vehicle. However, the fair market value of fuel provided by the University is excluded from the annual lease value. Therefore, University-provided fuel is included in the employee's gross income.

The University has elected to use a tax year beginning November 1 and ending October 31, for purposes of reporting pre-approved commuting use of University motor vehicles. Federal and State income tax, Medicare (if applicable), and SURS will be withheld from employee paychecks on December 16. Employees are required to complete the [Employee Statement of Employer-Provided Motor Vehicle](#) annually, and submit it to their units. The following information must be provided in the form:

- The number of total miles driven by employee during the reporting period.
- The number of pre-approved commuting miles driven by employee during the reporting period.
- Identification of the motor vehicle(s) assigned to the employee during the reporting period.

If more than one motor vehicle is assigned to an employee during a reporting period, the total and personal mileage must be detailed for each motor vehicle. The Unit submits this information to the Payroll Office.

Procedure to Request Exceptions

If a Unit wishes to use a University motor vehicle outside the scope of (1) approved use; (2) transporting an individual outside of the approved use list; or (3) using a commercially-insured motor vehicle outside of the approved use, the following procedures apply.

For Single Use Exceptions

When a Unit needs an immediate exception regarding approved University motor vehicle use, but does not anticipate a recurrence of the need, the following individuals may be petitioned to modify the existing policy on usage for the single use.

- University Administration: Senior Associate Vice President for Business and Finance
- Chancellors' representatives by campus: Vice Chancellor for Administration (UIC), and Executive Director of Facilities and Services (UIS and UIUC)

As always, the University motor vehicle's use should be for the benefit of the University, and it must be driven by an employee or student employee.

To Establish an Additional Category of Approved Use

The Senior Associate Vice President for Business and Finance and/or Chancellors' representative may be petitioned to modify the existing policy on vehicle use, and, in consultation with other University and campus administrators, make revisions from time to time to the approved use list, within the established guidelines. Under no circumstances are Unit heads allowed to authorize the use of University motor vehicles outside of the scope of authorized use.

How University Motor Vehicles Are Insured

Insurance

The State of Illinois provides automobile liability protection to State employees and State agencies for liability incurred by full-time, part-time, or student employees operating a University motor vehicle in the course of their employment. Students who are designated as official representatives of the University at various functions (that is, legislative hearings, Board of Trustees meetings, meetings of the State Board of Higher Education, and similar meetings) may use University motor vehicles, if necessary to perform official University responsibilities, and will be afforded the same liability protection as an employee.

The Senior Associate Vice President for Business and Finance or Chancellors' representative may authorize use of University motor vehicles, in limited circumstances, to individuals who are not University employees, but only when such individuals are working at the direction of, and for the benefit of, the University. For instance, with appropriate authorization a visiting scholar may be extended the privilege of using a University motor vehicle, as long as the use is for the benefit of the University. In those limited circumstances, such individuals will be afforded the same liability protection as an employee.

Note: Any individual operating a University motor vehicle must have completed a [Departmental Driver Approval form](#), or a Car Release Order form if using a fleet motor vehicle.] Under no circumstances may the motor vehicle be used for personal use.

The CMS is the State agency responsible for administering the State of Illinois Automobile Liability Self-Insurance Plan. The liability coverage provided by this plan extends to the above-referenced individuals while operating a University motor vehicle, in accordance with State of Illinois and University policies and procedures. The CMS automobile liability plan is the primary coverage for all University motor vehicles. The insurance protection provided by the plan applies in addition to any available automobile liability insurance an employee has on his/her own motor vehicle, or other non-owned, or rented motor vehicles. Neither the University, nor the State of Illinois, will insure the driver who uses a University motor vehicle for unauthorized purposes.

This policy provides general guidelines, as well as specific circumstances, under which protection is extended in accordance with Section 5040.350 of the Illinois Administrative Code (Authorized Use of Vehicles - passengers). Careful consideration has been given to the types of activities and endeavors the University supports, and may include instances when an employee

may drive a University motor vehicle while transporting individuals who may not be University employees. Assuming a motor vehicle accident occurs when an employee is deemed to have failed to exercise the proper degree of care required under the circumstances, causing harm to another driver, passenger, or pedestrian, the liability owed to the harmed party should be covered by the CMS Automobile Liability Self-Insurance Plan.

While the State of Illinois may accept liability to others harmed by a University employee's negligence in operating a University motor vehicle, occupants of University motor vehicles are not provided any medical payments coverage in the event they are themselves injured. The CMS Plan does not provide medical payments coverage. University employees, while acting within the scope of their employment, are covered by Workers' Compensation benefits if injured while an occupant of a University motor vehicle. Occupants, other than employees, who may be injured, should exhaust all other sources of recovery for medical bills related to their injuries. On a case-by case basis, the University may extend the courtesy of aiding an individual with those costs, should circumstances warrant. Under no circumstance will the University pay more than \$10,000 in medical payments on behalf of an individual in the afore-mentioned situation.

Any personal property belonging to the driver and/or occupants is the responsibility of those individual(s). Neither the University nor the State of Illinois provides any insurance coverage for personal property.

Reporting an Accident Involving a University Vehicle

Driver Responsibilities

Drivers of University vehicles must regard vehicle accidents with the same sense of responsibility as if the accident involved their own vehicle. Failure to report an accident promptly may result in State of Illinois refusal to defend the driver (i.e., the University employee) in a lawsuit, or to pay a judgment on behalf of the driver. The University also has the right to suspend an individual driver or an entire unit from further use of University motor vehicles, should they fail to report accidents promptly and completely.

In addition, the University and its employees must comply with the Illinois Administrative Code (Section 5040.520), which states that the:

“...driver of a state-owned or leased vehicle which is involved in an **accident of any type** shall report such accident to the appropriate law enforcement agency *and* to the Division of Central Management Services by completing the Illinois Motorist Report of Motor Vehicle Accident form (SR-1).”

All accidents involving University motor vehicles must be reported immediately – even while still at the scene of the accident if possible. “University motor vehicles” includes: rented and leased vehicles, department, car/motor pool vehicles assigned on a long-term basis, and daily

or short-term rentals from the car/motor pool. An “accident” is defined as, “harm to state-owned property and/or harm to another party’s person or property.”

Additional information is available under, “Accidents in University Vehicles: Regulations and Coverage,” in the University Office of Risk Management (UORM) [FAQ](#).

If You Have an Accident While Driving a University Vehicle, and the University Vehicle is Damaged While in Your Possession (only the University vehicle is damaged).

1. Follow the instructions found in the [Vehicle Accident Response Plan](#) brochure in the vehicle’s glove compartment.
2. Report the accident to your [campus transportation office](#) and your immediate supervisor immediately. Accidents **must** be reported to the University **within 24 hours** of the incident, or on the next business day following a weekend and/or University holiday.
3. As soon as possible: complete the **SR-1 Illinois Motorist Report of Motor Vehicle Accident** (view [SR-1 example](#)) and submit it to your campus transportation office, preferably within 24 hours, but **not later than three days** following the accident.

The SR-1 form must be submitted in all cases, either by the driver or by his/her immediate supervisor, even if the driver is still in travel status. It is the driver’s responsibility to ensure that the SR-1 is submitted to your campus transportation office within three days of an accident, to avoid forfeiture of coverage from the state.

Blank SR-1 Illinois Motorist Report of Motor Vehicle Accident forms are provided in the glove compartment of every University motor vehicle.

If the Accident Involves Damage to Other Vehicles, Property, and/or Persons

1. Follow the instructions found in the [Vehicle Accident Response Plan](#) brochure in the vehicle’s glove compartment.
2. Report the accident to your [campus transportation office](#) and your immediate supervisor immediately. Accidents **must** be reported to the University **within 24 hours** of the incident, or on the next business day following a weekend and/or University holiday.
3. As soon as possible: complete the **SR-1 Illinois Motorist Report of Motor Vehicle Accident** (view [SR-1 example](#)) and submit it to your campus transportation office, preferably within 24 hours but **not later than three days** following the accident.

The SR-1 form must be submitted in all cases, either by the driver or by his/her

immediate supervisor, even if the driver is still in travel status. It is the driver's responsibility to ensure that the SR-1 is submitted to your campus transportation office within three days of an accident, to avoid forfeiture of coverage from the state.

It is the driver's responsibility to ensure that the SR-1 is submitted to UORM within three days of an accident, to avoid forfeiture of coverage from the state.

Blank SR-1 Illinois Motorist Report of Motor Vehicle Accident forms are provided in the glove compartment of every University motor vehicle.

4. The University submits your SR-1 report to CMS Auto Liability Division, within seven days of the accident (for all vehicle accidents with another motorist or pedestrian resulting in real or alleged bodily injury and/or damage to property).
5. Depending on the circumstances of the accident, you may want to alert your personal auto insurance carrier. If, for example, you report the claim late and/or the accident occurred during non-business use of the vehicle, the State of Illinois will deny the claim. For this reason you may wish to preserve your rights under your personal auto insurance policy,

If You Are Driving a Rental or Personally-owned Vehicle for University Business Purposes

Driver protections and responsibilities are significantly different in the event of an accident involving the use of a personal or rental vehicle for University business purposes. Units, and individual drivers, need to be aware of these differences before deciding whether to use non-University vehicles when in travel status. The related Employee Business Travel policy, [Use of Personal and Rental Motor Vehicles for Official University Travel](#), provides details to help you make an informed decision.

Who to Ask

Campus Transportation Offices

- UIC: CARS – (312) 996-2886
- UIUC: University Carpool – (217) 333-3910
- UIS: (217) 206-6700
- University Office of Risk Management (all campuses):
<http://www.obfs.uillinois.edu/risk/>

Responsibilities of Departments to Ensure Compliance With University Policy

It is a University requirement that ALL individuals who drive a University motor vehicle must have a valid driver's license. For the purpose of this section, University motor vehicles are divided into two categories - department vehicles, and fleet or motor pool vehicles.

Department, Permanently Assigned, and/or Fleet/Motor Pool Vehicles Assigned on a Long-Term Basis

The custodianship of department motor vehicles and/or motor pool vehicles assigned on a long-term basis resides with the Unit. To comply with policy, the Unit is responsible for: (1) inspecting, on an annual basis, the driver's licenses of those individuals who will be driving the motor vehicles; and (2) having each designated driver sign a [Departmental Driver Approval form](#) prior to that individual's use of the University motor vehicle. There are no exceptions. Completion of the Departmental Driver Approval Form ensures that all drivers are aware of the requirements, restrictions, and responsibilities associated with the use of a University motor vehicle. Departments should designate an employee to be responsible for oversight and supervision of University motor vehicles.

As a part of the annual review, the designated University employee will physically inspect the actual driver's license* to ensure that it is current and valid. If the employee fails to produce a valid and current driver's license, that employee will not be allowed to use the University motor vehicle.

*A valid driver's license is one issued in the employee's state of residence. New Illinois residents may drive on a valid out-of-state, or valid foreign driver's license, for 90 days, after which an Illinois license is required. (An international driver's license, accompanied by a valid foreign driver's license, is acceptable.) Employees and student employees who have not declared Illinois as their state of residence may drive on a valid out-of-state or foreign driver's license.

Departments must maintain copies of employees' signed [Departmental Driver Approval form](#), for a minimum of two years. These forms, including any driver's licenses information, should be kept in a secure location.

Units with permanently-assigned University motor vehicles must retain the *original* letter indicating approval for the assigned motor vehicle must be maintained, along with the annual Justification Letter attesting to the Unit's continuing need for the motor vehicle. The continuing need for a motor vehicle that has been assigned on a permanent basis is subject to annual review.

Departments that authorize the use of any University motor vehicle (department-owned or rented through Car Pool on a long-term or short-term basis) must follow established policy and procedures for its proper use.

Drivers are divided into two categories - frequent and infrequent users. In addition to the procedures outlined above, the department employee who is responsible for oversight and supervision of the use of University motor vehicles must:

Frequent Users

- Survey the Unit and identify all drivers of University motor vehicles, including employees, and student employees. This review may also include obtaining information from any non-employees who are given permission by the Senior Associate Vice President for Business and Finance or Chancellor's representative, to use a University motor vehicle.

A [Departmental Driver Approval form](#) must be completed and on file for each driver. (This may include employees from other Units who may drive the motor vehicle; for example, there may be instances when multiple drivers will be driving one University motor vehicle during the same trip.)

- Ensure that all drivers are provided a link to this policy, and all other related policies in the OBFS Policies and Procedures manual.
- Provide an electronic copy of the [Departmental Driver Approval form](#) to all drivers.
- Annually review all current Department Driver Approval forms.
- Each July, collect *new* Department Driver Approval forms from all drivers. For new hires, this should be a part of the department's orientation process, and collected annually thereafter.

Infrequent or One-Time Users

- Ensure that the driver is given a link to this policy, and all other related policies in the OBFS Policies and Procedures manual.
- Provide an electronic copy of the [Departmental Driver Approval form](#), in order for the driver to review it thoroughly prior to completing the document.
- Let the driver know that the Departmental Driver Approval form will remain on file the remainder of the fiscal year, and that a new form must be submitted when the next fiscal year begins, should he/she again require the use of a University motor vehicle.

Campus Parking of Permanently Assigned Motor Vehicles

Motor vehicles assigned to a campus Unit on a permanent basis should designate parking space on University premises when they are not in use. Parking spaces should be relatively secure and visible. If a motor vehicle is not used for an extended period, such as during a long holiday, it should be parked at the Transportation Facility (UIC), the Motor Pool (UIS), or the Car Pool (UIUC). The cost of repair to motor vehicles damaged when not parked at the campus car pool parking lot is the responsibility of the Unit to which it is assigned.

Responsibilities of the Transportation Facility to Ensure Compliance With University Policy

Fleet or Motor Pool Vehicles - Daily or Short-term Rental

Custodianship of fleet or motor pool vehicles for daily or short-term rental, resides with the Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC). To comply with policy, the Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) are responsible for physical inspection of driver's licenses, to ensure validity, prior to releasing a University motor vehicle to the driver designated on the signed Car Release Order. If the designated driver(s) shown on the Car Release Order fails to produce a valid current driver's license*, he/she will be refused use of the University motor vehicle.

*A valid driver's license is one issued in the employee's state of residence. New Illinois residents may drive on a valid out-of-state, or valid foreign driver's license, for 90 days, after which the State requires an Illinois license. (An international driver's license, accompanied by a valid foreign driver's license, is acceptable.) Employees and student employees who have not declared Illinois as their state of residence may drive on a valid out-of-state or foreign driver's license.

Fleet Management

Passenger vehicles may be assigned to an employee for a specific trip, or to a campus Unit on a long-term or permanent basis, with authorized funding, written justification, and unit approval. The continuing need for a passenger vehicle that has been assigned on a permanent basis is subject to annual review. The campus unit authorizing the use of the passenger vehicle is charged by mileage and/or time for use of the passenger vehicle. The rate charged is based on the actual operating, maintenance, and depreciation costs of the fleet.

If a campus unit requires the use of a fleet or motor pool vehicle for daily or short-term rental, the department must complete and submit a signed Car Release Order ([UIC/UIUC](#); or [UIS](#)).

- At UIUC, the form can be downloaded by employees who have department authorization to use the [UIUC Car Pool website](#) (an F&S user account and password are required).
- For additional information, contact the UIUC Car Pool at 217-333-3910.

The Car Release Order form authorizes the appropriate campus office to release a passenger vehicle for a specific purpose and length of time. The Unit that originally issued the Car Release Order must authorize any extension request, and that unit must notify The Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) of the approved extension. If the Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) are not notified of a cancellation of a trip reservation, the unit may be subject to an additional charge.

The Transportation Facility (UIC), the Motor Pool (UIS), and the Car Pool (UIUC) will inspect the driver's licenses of all authorized drivers shown on the Car Release Order (see [Driver Requirements: Eligibility to Drive University Motor Vehicles](#)). Alternate drivers (any authorized

driver in addition to the primary driver whose name is listed on the Car Release Order) must complete and submit a signed [Alternate Drivers Car Release](#). Drivers who do not qualify to operate a University motor vehicle are denied use.

Expenses of operation

Details may vary by campus, but in general, when a motor vehicle is operated in a city served by a campus car pool office, that campus car pool office must furnish all gasoline, oil, service, and repairs. When a motor vehicle is operated outside a city served by a campus car pool office, the credit card furnished with the motor vehicle should be used for the purchase of:

- Gasoline, oil, and lubrication service;
- Tire and battery service;
- Vehicle washing on extended trips; and,
- Cost of repairs under \$50.

Copies of all credit receipts must be given to the appropriate campus car pool office. The campus car pool office will reimburse necessary cash purchases, if a receipt is submitted.

For emergency repairs more than \$50, call the appropriate campus car pool office to find out what should be done. If the campus car pool office is closed, call the University Police for guidance. Campus car pool offices and the University Police will accept Collect Calls if necessary.

Last Updated: June 12, 2012

Office of Business and Financial Services

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