



# MORPC Section 5310 Group Transit Asset Management Plan

2018

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## Section 1: Overview

### Introduction

In 2016, the Federal Transit Administration (FTA) published a rule, 49 CFR Part 625, to require public transit providers that receive Federal transit assistance to undertake certain transit asset management activities. Transit asset management is the strategic and systematic practice of procuring, operating, inspecting, maintaining, rehabilitating, and replacing transit capital assets to manage their performance, risks, and costs over their life cycles, for the purpose of providing safe, cost-effective, and reliable public transportation. Asset management is a cornerstone of effective performance management. By leveraging data to improve investment decision-making, asset management improves reliability, safety, cost management, and customer service.

### Background

Maintaining transit assets, such as rolling stock, infrastructure, equipment, and facilities, in a state of good repair is essential to maintaining safety, ensuring system reliability, and reducing long-term maintenance costs. In its 2010 National State of Good Repair Assessment, FTA found that more than 40% of bus assets and 25% of rail transit assets were in marginal or poor condition. There is an estimated backlog of \$50–\$80 billion in deferred maintenance and replacement needs, a backlog that continues to grow. Transit agency customers, policymakers, and public agencies are holding agency management accountable for performance and increasingly expect more business-like management practices. The magnitude of these capital needs, performance expectations, and increased accountability requires agency managers and accountable executives to become better asset managers.

MAP-21 required the establishment of a National Transit Asset Management (TAM) System that would include a definition of “state of good repair;” requirements that recipients and subrecipients of federal transit funding develop transit asset management plans; state of good repair performance measure and reporting requirements; and annual reporting requirements.

To ensure compliance with the requirements of MAP-21, the FTA published a final rule on TAM planning requirements on July 26, 2016. The final rule included a transit-specific asset management framework for managing assets individually and as a portfolio of assets that comprise an integrated system. Within that framework, the FTA has identified three potential roles in transit asset management planning:

- **Tier I Provider** is a recipient that owns, operates, or manages either (1) one hundred and one (101) or more vehicles in revenue service during peak regular service across all fixed route modes or in any one non-fixed route mode, or (2) rail transit. Tier I providers must develop their own, individual TAM plan.
- **Tier II Provider** is a recipient that owns, operates, or manages (1) one hundred (100) or fewer vehicles in revenue service during peak regular service across all non-rail fixed route modes or in any one non-fixed route mode, (2) a subrecipient under the 5311 Rural Area Formula Program, (3) or any American Indian tribe. Tier II providers can develop their own individual TAM plan or can be included in a group plan developed by a sponsor agency.
- **Sponsor Agency** is a State, a designated recipient, or a direct recipient that develops a group TAM for at least one tier II provider.

Asset management processes are ongoing and involve evaluating and managing the relationships between costs, risks, and performance over the asset’s lifecycle. The transit asset management framework has three categories of business processes:

1. Asset Management Vision and Direction – agency-wide processes that establish the organization-wide asset management policy and strategy and drive resource allocation
2. Lifecycle Management – the processes involved in the lifecycle management of individual asset classes; these include managing the data (inventory), monitoring the assets’ condition and performance, and developing lifecycle management plans
3. Cross-Asset Planning and Management – agency-wide processes that consider information from all asset classes to support the capital programming and operations and maintenance budgeting process

The fundamental concepts of asset management are straightforward; however, implementing the changes required to become a mature asset management organization requires careful planning and execution. In recognition of the potential administrative and planning burden facing small participating organizations, FTA established new guidelines and planning requirements for State Departments of Transportation.

Specifically, §625.27 requires that Sponsors develop a group TAM plan for all open door subrecipients under the Enhanced Mobility of Seniors & Individuals with Disabilities (Section 5310). The sponsor is responsible for setting unified targets for the plan participants and share that information with MPOs that house their participating providers.

The Mid-Ohio Regional Planning Commission (MORPC) group plan will include all open door subrecipients under the Enhanced Mobility of Seniors & Individuals with Disabilities (Section 5310) in Delaware and Franklin Counties in Central Ohio.

### Transit Asset Management Plan Requirements

MORPC has developed this MORPC Section 5310 Group Transit Asset Management Plan in accordance with the guidelines established by the FTA. Specifically, §625.25 requires that all TAM plans must include:

1. An inventory of the number and type of capital assets. (Appendix A) The inventory must include all capital assets that the provider owns, except equipment with an acquisition value under \$50,000 that is not a service vehicle. See Section 3.
2. A condition assessment of those inventoried assets for which a provider has direct capital responsibility (Appendix B). A condition assessment must generate information in a level of detail sufficient to monitor and predict the performance of the assets and to inform the investment prioritization. See Section 4.
3. A description of analytical processes or decision-support tools used to estimate capital investment needs over time (Appendix C). See Section 5.
4. A project-based prioritization of investments (Appendix D). See Section 6.

In addition to required elements noted above, group plan sponsors, such as MORPC, must ensure the following:

1. Coordination with the development of the plan with each Section 5310 subrecipients Accountable Executive; and
2. That the completed group plan is made available to all participants in a format that is easily accessible.

### About Agency and 5310 Program

The Mid-Ohio Regional Planning Commission (MORPC) is a voluntary association of local governments and regional organizations that envisions and embraces innovative directions in

economic prosperity, energy, the environment, housing, land use, and transportation. Our transformative programming, services and innovative public policy are designed to promote and support the vitality and growth in the region.

In 2014, the Governor of Ohio named MORPC as the designated recipient for Delaware and Franklin Counties (Central Ohio) for FTA Section 5310 Enhanced Mobility of Older Adults & Individuals with Disabilities. As the administrator of these funds for Central Ohio, MORPC serves as the Group TAM Plan Sponsor for the open-door agencies that receive Section 5310 funding.

Of the agencies in Central Ohio that have received Section 5310 funding that are not transit agencies, 7 agencies are deemed “open door” agencies. This means that while the transportation they provide is limited to a certain age range or disability status or geographical area, it is not available only for members, but is open to the public after meeting those thresholds.

## Section 2: Transit Asset Management Group Plans

### TAM Plan Inclusion

To create this Transit Asset Management Group Plan, MORPC evaluated the recipients of Section 5310 funds to determine if they were open or closed door agencies. An agency is determined to be open door if it provides transportation is open to anyone and not only to members or clients. A transportation service may still be open door if it is limited by age, disability status, or geographic region, it just cannot be limited by membership or clientele status. Seven agencies were determined to be open door, see below.

Yellow Cab is included as a taxi company because while it has contracts with closed door agencies to provide transportation services, these vehicles are also used for regular taxi services and are open to the public for use. Arch Express Transportation is also a taxi company that received a vehicle through the 5310 program, but it uses its 5310 vehicle for contract-based work with closed-door agencies and is therefore not included.

Table 1: MORPC Section 5310 Open Door Agencies

Agency Name	Agency Type
American Red Cross	Private non-profit
Canal Winchester Human Services	Private non-profit
City of Groveport	Municipality
Clintonville-Beechwold Community Resources Center	Private non-profit
LifeCare Alliance	Private non-profit
NetCare Corporation	Private non-profit
Yellow Cab of Columbus	Private for-profit

## Section 3: Vehicle Asset Inventory

This group plan has a combined vehicle asset inventory and it can be found in Appendix A.

### Data Collection

MORPC follows the Ohio Department of Transportation's (ODOT) schedule and method for reporting on Section 5310 vehicles. Every subrecipients who receives a vehicle through the MORPC Section 5310 program must submit reports on that vehicle (or vehicles) through ODOT's Specialized Transportation Program Vehicle Monitoring Report website twice a year (due January 31 and July 31). The data collected from these reports are sent automatically to MORPC staff and are hand entered into a database.

This report form captures odometer readings, miles traveled between reports, miles per gallon, days operated, types of one-way trips, total trips, condition rating, maintenance costs, number of crashes, agency-wide number of individuals transported, and asks for the agency Preventative Maintenance Plan. The reports generated from this allows MORPC to monitor how the 5310 funded vehicles are being used, and it also provides information on the vehicles' ongoing maintenance and conditions.

In order to gather the needed information for the completion of this plan, MORPC sent the Accountable Executive of all open-door agencies a survey and a spreadsheet to fill out and were asked to send copies of the agency's preventative maintenance plan. The survey asked each Accountable Executive to describe how the agency determines what priority investments are needed in order to maintain a state of good repair for the vehicles and to describe the agency's investment prioritization process. They were also asked to provide a list of the selected projects and programs prioritized based on the agency's criteria and to rank the projects and order them by year of implementations.

The spreadsheet captured information about the current mileage, age, and condition of all vehicles with federal interest. This information and the information gathered in the surveys were used to create the Capital Asset Inventory (Appendix A), Condition Assessment (Appendix B), Decision Support Tools (Appendix C), and Priority Capital Investments (Appendix D).

### Vehicle Classifications

The MORPC Regional 5310 Vehicle Stock is made up of light transit vehicles, modified minivans, and automobiles. Light transit vehicles fall under the vehicle type of "cutaway" (CU), MV-1s and LTN/LTLs fall under the vehicle type of "van" (VN); modified minivans fall under "minivan" (MV); and automobiles fall under "automobile" (AO) per the FTA.

## Section 4: Vehicle Condition Assessments

### Vehicle Condition Assessments

The MORPC Section 5310 Program closely follows the procedures and guidelines set by ODOT in the administration of its statewide Section 5310 Program for rural areas. Under Section 5513.01 (B) of the Ohio Revised Code, the ODOT Director may permit any political subdivision to participate in contracts under which the Director has entered for purchases. MORPC was granted permission to buy off of the ODOT contracts for all of the vehicles permissible under the statewide 5310 program.

For the purposes of the MORPC Section 5310 Program and this Section 5310 Group TAM Plan, the Useful Life Benchmark for the end of life for the vehicles will adhere to the guidelines set up by ODOT. These can be found in Table 2 below.

**Table 2: Vehicle Useful Life Benchmark**

Vehicle Type	Asset Class per FTA	Age/Mileage for Disposition
Sedan	AO	4 years & 100,000
Modified Minivans	MV	5 years & 120,000 miles
Accessible Vans	VN	5 years & 120,000 miles
MV-1	VN	5 years & 120,000 miles
LTL/LTN	VN	5 years & 120,000 miles
LTV	CU	6 years & 150,000 miles

A Condition Assessment is the process of assessing and documenting the condition or residual life of an asset. A Vehicle Condition Assessment Scale has been set based on age, mileage, and frequency and intensity of repairs required, found below in Table 3.

**Table 3: Vehicle Condition Assessment Scale**

Table 2: Vehicle Condition Assessment Scale		
Rank	Category	Description
5	Excellent	Brand new, no major problems exist, only routine preventive maintenance.
4	Good	Elements are in good working order, requiring only nominal or infrequent minor repairs (greater than 6 months between minor repairs).
3	Fair	Requires frequent minor repairs (less than 6 months between repairs) or infrequent major repairs (more than 6 months between major repairs).
2	Poor	Requires frequent major repairs (less than 6 months between major repairs).
1	Bad	In poor condition that continued use presents potential problems.

A full assessment of the conditions of these Section 5310 funded vehicles can be found in Appendix B. Of the 19 vehicles assessed, 3 are past the useful life benchmark and need to be replaced. Ten vehicles are in excellent condition and are new. An overview of the percentage of vehicle stock beyond its useful life per the TERM scale can be seen in Table 4.

**Table 4: 5310 Group Asset TERM Scale**

5310 Group Asset TERM Scale				
Asset Type	% beyond useful life or above 3.0 on TERM scale			
<i>Vehicle Stock</i>	2018	2019	2020	2021
Automobile	100%	50%	50%	0%
Minivan	78%	44%	44%	25%
Van	0%	0%	0%	0%
Cutaway	0%	0%	0%	0%

When allocating the Section 5310 funds, the MORPC team takes into account the age and condition of each applicant's fleet and if the applicant is looking to replace old and past useful life vehicles or if the applicant is looking to expand its fleet. The MORPC team will continue to do this to help applicant agencies maintain a safe fleet and a high State of Good Repair.

## Section 5: Decision Support Tools

Each 5310 Subrecipient is different from the size of the agency, its scope, and the size of its fleet. One of the agencies is part of a national organization, one is a municipality, several are private nonprofit organizations, and one is a for profit organization. These differences mean each determines the State of Good Repair slightly differently.

Decision Support Tools are an analytic process or methodology to: (1) help prioritize projects to improve and maintain the state of good repair of capital assets within a public transportation system, based on available condition data and objective criteria; or, (2) assess financial needs for asset investments over time. While the Section 5310 subrecipients covered in this Group TAM Plan are different, they all use age, mileage, and funding availability to assess when a vehicle needs to be replaced and when the agency is able to replace it.

A compendium of the 5310 Subrecipients' decision support tools can be found in Appendix C. The 5310 Subrecipients' preventative maintenance plans can be found in Appendix E.

## Section 6: Investment Prioritization

Investment Prioritization refers to a transit provider's ranking of capital projects or programs to achieve or maintain a state of good repair based on financial resources from all sources that a transit provider reasonably anticipates will be available over the TAM plan horizon period.

As stated in Section 5, each of the 5310 Subrecipients is different. Some are large, some are small. Some have a nationwide organization behind them, some are municipalities. Therefore, each has a different ability to fund investments in infrastructure. Each 5310 Recipient, though, does prioritize vehicle and transportation investments by looking at age, mileage, and repair needs of each vehicle in its current fleet, and by the funding available to make new investments. Due to differing fiscal constraints, the 5310 Recipients have slightly different definitions for the useful life of their vehicles.

A compendium of the 5310 Subrecipients' investment prioritization narratives that were submitted can be found in Appendix D.

## Section 7: Glossary

### Definitions

**49 U.S.C. Section 5310:** This program is intended to enhance mobility for seniors and persons with disabilities by providing Federal Transit Administration funds for programs in small urbanized and rural areas that serve the special needs of transit-dependent populations beyond traditional public transportation services and Americans with Disabilities Act (ADA) complementary paratransit services. The program provides 80% of the cost of capital projects; the remaining 20% must be provided by local funding, which may be derived from other federal (non-U.S. DOT) transportation sources or the Federal Lands Highway Program.

**5310 Subrecipient:** Subrecipients of the MORPC Section 5310 funding program.

**Asset:** Assets include equipment, vehicles, or real property that are divided into two categories as follows:

1. Inventoried equipment – non depreciable
  - a. A purchase cost of greater than \$1,000 and less than \$5,000
  - b. A useful life of greater than one year
2. Capital Equipment - depreciable
  - a. A purchase cost of greater than \$5,000
  - b. A useful life of greater than one year

**Decision support tool:** an analytic process or methodology:

1. To help prioritize projects to improve and maintain the state of good repair of capital assets within a public transportation system, based on available condition data and objective criteria; or
2. To assess financial needs for asset investments over time.

**Direct recipient:** An entity that receives Federal financial assistance directly from the Federal Transit Administration.

**FTA:** Federal Transit Administration

**Group TAM plan:** means a single TAM plan that is developed by a sponsor on behalf of at least one tier II provider (including smaller subrecipients of 5311 or 5310 grant programs).

**Investment Prioritization:** A transit provider's ranking of capital projects or programs to achieve or maintain a state of good repair based on financial resources from all sources that a transit provider reasonably anticipates will be available over the TAM plan horizon period.

**MORPC:** Mid-Ohio Regional Planning Commission.

**ODOT:** Ohio Department of Transportation.

**Open door agency:** An agency is determined to be open door if it provides transportation is open to anyone and not only to members or clients. A transportation service may still be open door if it is limited by age, disability status, or geographic region, it just cannot be limited by membership or clientele.

**Sponsor:** A State, a designated recipient, or a direct recipient that develops a group TAM for at least one tier II provider.

**State of Good Repair:** An asset or system is in a state of good repair when no backlog of capital needs exists – hence all asset life-cycle investment needs (e.g., preventive maintenance and rehabilitation) have been addressed and no capital asset exceeds its useful life.

**Subrecipient:** An entity that receives Federal transit grant funds indirectly through a State or a direct recipient.

**Useful Life:** Useful life of rolling stock begins on the date the vehicle is placed in revenue service and continues until it is removed from service. Minimum useful life for buses, vans, trolleys, and ferry boats is determined by years in service or accumulation of miles, whichever comes first, see Table 2.

**Tier I provider:** A recipient that owns, operates, or manages either (1) one hundred and one (101) or more vehicles in revenue service during peak regular service across all fixed route modes or in any one non-fixed route mode, or (2) rail transit.

**Tier II provider:** A recipient that owns, operates, or manages (1) one hundred (100) or fewer vehicles in revenue service during peak regular service across all non-rail fixed route modes or in any one non-fixed route mode, (2) a subrecipient under the 5311 Rural Area Formula Program, (3) or any American Indian tribe.

**Transit asset management (TAM):** The strategic and systematic practice of procuring, operating, inspecting, maintaining, rehabilitating, and replacing transit capital assets to manage their performance, risks, and costs over their life cycles, for the purpose of providing safe, cost-effective, and reliable public transportation.

## Appendix B: Vehicle Condition Assessments

Asset Owner	Asset Class	Asset Name	Vehicle Year	Vehicle Make	Vehicle Model	Count	VIN	Acquisition Year	Age (Yrs)	Vehicle Mileage	Replacement Cost/ Value	Useful Life Benchmark	Scale Condition*	Past Useful Life
American Red Cross	MV	PNP-0025-008-332	2015	Dodge	Caravan	1	2C7WDGBG2FR634302	2015	3	78,457	\$38,000	5 Years/ 120,000 Miles	3	No
American Red Cross	MV	PNP-0025-010-002	2015	Dodge	Caravan	1	2C7WDGBG0FR599453	2015	3	88,399	\$38,000	5 Years/ 120,000 Miles	3	No
American Red Cross	MV	PNP-0025-008-245	2013	Dodge	Caravan	1	2C4RDGBG1DR617479	2013	5	152,144	\$38,000	5 Years/ 120,000 Miles	1	Yes
American Red Cross	MV	PNP-0025-008-244	2013	Dodge	Caravan	1	2C4RDGBG1DR617482	2013	5	117,243	\$38,000	5 Years/ 120,000 Miles	1	Yes
Canal Winchester Human Services	CU	SPEC/025/08424	2018	Ford	E-350	1	1FDEE3FS6JDC08424	2017	1	1,665	\$50,000	6 Years/ 150,000 Miles	5	No
City of Groveport	AO	PNP-0025-006-037	2012	Ford	Crown Victoria	1	1FTDS3ELXCDA67539	2013	5	82,621	\$43,779	4 Years/ 100,000 Miles	1	Yes
City of Groveport	AO	PNP-0001-009-009	2014	Ford	Crown Victoria	1	1FTDS3EL9EDA90345	2015	3	67,138	\$43,779	4 Years/ 100,000 Miles	2	No
City of Groveport	VN	SPEC-025-01505	2016	MV-1	MV-1	1	57WMD2C68GM100444	2017	1	20,742	\$43,779	5 Years/ 120,000 Miles	5	No
Clintonville-Beechwold CRC	CU	SPEC/025/60939	2017	Ford	E-350	1	1FDEE3FSXHDC60939	2017	1	8,382	\$44,357	6 Years/ 150,000 Miles	5	No
Clintonville-Beechwold CRC	CU	SPEC/025/61991	2017	Ford	E-350	1	1FDEE3FS6HDC61991	2017	1	7,149	\$44,357	6 Years/ 150,000 Miles	5	No
Clintonville-Beechwold CRC	CU	SPEC/025/61992	2017	Ford	E-350	1	1FDEE3FS8HDC61992	2017	1	6,918	\$44,357	6 Years/ 150,000 Miles	5	No
Clintonville-Beechwold CRC	CU	SPEC/025/61993	2017	Ford	E-350	1	1FDEE3FSXHDC61993	2017	1	7,148	\$44,357	6 Years/ 150,000 Miles	5	No
LifeCare Alliance	CU	SPEC-0025-008-352	2016	Ford	E-350	1	1FDEE3FL8GDC25999	2016	2	11,187	\$50,000	6 Years/ 150,000 Miles	5	No
LifeCare Alliance	CU		2014	Ford	E-350	1	1FDEE3FL8EDA72084	2018	0	53,891	\$50,000	6 Years/ 150,000 Miles	5	No
Netcare Corporation	MV	PNP-0025-009-047	2014	Dodge	Grand Caravan	1	2C7WDGBG8ER319583	2014	4	54,661	\$42,584	5 Years/ 120,000 Miles	2	No
Netcare Corporation	MV	SPEC-0025-008-360	2015	Braun	Grand Caravan	1	2CTWDGBG4FR623026	2015	3	53,608	\$42,584	5 Years/ 120,000 Miles	3	No
Netcare Corporation	MV	SPEC-0025-010-031	2015	Braun	Grand Caravan	1	2C7WDGBG4FR634236	2016	2	65,106	\$42,584	5 Years/ 120,000 Miles	3	No
Yellow Cab	MV	SPEC025015101	2017	Dodge	Caravan	1	2C7WDGBG0HR718136	2017	1	49,750	\$50,000	5 Years/ 120,000 Miles	5	No
Yellow Cab	MV	SPEC025015102	2017	Dodge	Caravan	1	2C7WDGBG0HR718587	2017	1	75,945	\$50,000	5 Years/ 120,000 Miles	5	No

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LifeCare Alliance	CU	SPEC-0025-008-352	2016	Ford	E-350	1	1FDEE3FL8GDC25999	2016	2	11,187	\$50,000	6 Years/ 150,000 Miles	5	No
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Netcare Corporation	MV	SPEC-0025-010-031	2015	Braun	Grand Caravan	1	2C7WDGBG4FR634236	2016	2	65,106	\$42,584	5 Years/ 120,000 Miles	3	No
Yellow Cab	MV	SPEC025015101	2017	Dodge	Caravan	1	2C7WDGBG0HR718136	2017	1	49,750	\$50,000	5 Years/ 120,000 Miles	5	No
Yellow Cab	MV	SPEC025015102	2017	Dodge	Caravan	1	2C7WDGBG0HR718587	2017	1	75,945	\$50,000	5 Years/ 120,000 Miles	5	No

## Appendix C: Decision Support Tools

### American Red Cross

The American Red Cross works with Element to help manage the fleet across the country. Any repair and/or service needs to be completed at an Element approved location. Our program (Community Transportation Program, CTP) is dedicated to following maintenance as suggested and recommended by the vehicle manufacturer. In addition, any service has to be approved by Element prior to the work being completed. If the cost of any repair or service is estimated to be more than \$1,000 Element contacts the Regional COO to determine if the vehicle is mission critical and if the repairs should be completed.

### Clintonville-Beechwald Community Resources Center

Clintonville-Beechwald Community Resources Center (CRC) uses QuickBooks accounting software to track annual transportation expenses by vehicle. This historical data allows CRC to plan for how much should be allocated each year for future repairs. CRC then annually covers the cost of these repairs utilizing grants, special event fundraisers, and individual contributions.

As a Settlement House, the agencies investment prioritization process is based on the needs of the Clintonville-Beechwald neighborhood. Programs are started and remain based on continued need of the neighborhood. Because the Clintonville-Beechwald area has the highest percentage of seniors in Franklin County (43214) senior services and transportation remains very high in the prioritization process. Using local research, this number is predicted to rise and senior services and transportation will remain a critical need and will continue to grow at CRC as the senior population increases.

### City of Groveport

The Groveport Transportation fleet consists of 4 vehicles that are driven on a very regular schedule (Mon.-Fri.). Each vehicle is inspected each time it is driven. We are able to monitor the maintenance needs as they arise. The vehicle needing maintenance is scheduled for repair immediately. Regular maintenance is done each 5 months or 5,000 miles.

### LifeCare Alliance

Transportation Manager provides fleet management making sure daily inspections of each agency owned vehicle is conducted. Maintains repair/maintenance history on each vehicle submitting purchase requests for consideration and approval. Once a vehicle reaches a certain mileage point, discussion is conducted on the decision to maintain vehicle in fleet. Transportation Manager prepares an annual vehicle need plan and submits that to senior management.

### Netcare Access

Our agency will review current information, analyze and collaborate as senior staff to determine what project is deemed as the highest priority. Our procedure is to estimate the amount of excess cash available above day-to-day requirements and that the CFO maintain pertinent financial records so we can make such determinations to ensure ongoing financial stability.

## Appendix D: Investment Prioritization

### American Red Cross

The American Red Cross works with Element to help manage the fleet across the country. Each fiscal year the fleet is analyzed to identify vehicles that have over 100,000 miles and is more than 6 years old. Once the number of vehicles that fit these two criteria are identified the total cost to replace them is calculated. If the cost of replacement is more than the funds available for the budget then additional considerations like condition, repair cost history are considered to prioritize which vehicles will be replaced. There is also a limited budget pool to support the emergency replacement of mission critical vehicles that are not included in the budget for replacement when the cost to repair is determined to be too great for any vehicle with high mileage and excessive age.

### Clintonville-Beechwold Community Resources Center

CRC prioritizes investment based on the safety and reliability of the vehicle and whether the organization has funding available for investing in major repairs/maintenance. We are frequently turned down in grant applications for new vehicles as our transportation department continues to expand. It remains a priority for us to obtain new vehicles.

### City of Groveport

Groveport Transportation schedules replacement of vehicles on a rotation of every two years with the oldest vehicle. That would make each vehicle 8 years old (125,000 miles) at retirement.

### LifeCare Alliance

Transportation Manager prepares an annual vehicle need plan and submits that to senior management. This involves looking at the stability of each vehicle, future need based on service growth and secure specifications on any new vehicle being considered.

### Netcare Access

Our agency will review current information, analyze and collaborate as senior staff to determine what project is deemed as the highest priority. Our procedure is to estimate the amount of excess cash available above day-to-day requirements and that the CFO maintain pertinent financial records so we can make such determinations to ensure ongoing financial stability.

## Appendix E: Preventative Maintenance Plans of 5310 Subrecipients



**American  
Red Cross**

## **FLEET MANAGEMENT PROGRAM MANUAL**

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Biomedical Fleet operations are currently operating under all sections of this manual and will continue to do so.

Humanitarian Services Fleet Operations will have until the beginning of FY19 to comply with shaded sections of this manual. All other sections of this manual should already be implemented.

## FLEET MANAGEMENT POLICY

The Fleet Management Policy of the American Red Cross is based on four concepts; all fleet vehicles are resources to be used across the organization, all vehicles are properly maintained, all drivers are qualified and approved by the Red Cross before driving, and drivers are required to adhere to Red Cross safe driving guidelines safety. The concepts are listed below.

### I. Fleet Resources

The American Red Cross vehicle fleet is a resource available for use across all lines of business. Specialized vehicles may be restricted in their availability for use.

### II. Vehicle Maintenance

All vehicles are maintained to meet mission critical requirements.

### III. Qualified Drivers

The American Red Cross will verify that any person driving an American Red Cross vehicle possesses a valid driver's license issued from their state of residence and without any restrictions limiting time of driving, driving destinations, or requiring another licensed driver to observe. Each driver will be approved for driving only after:

- an initial motor vehicle record (MVR) review is completed,
- the driver completes the Red Cross defensive driving course or equivalent, and
- a road test is successfully completed for any vehicles other than a passenger car, SUV, or minivan.

### IV. Driver Safety

- Driving a vehicle on behalf of the Red Cross requires adherence to all applicable laws and Red Cross-specific policies.
- Every Motor Vehicle Incident (MVI) will be reported, documented and reviewed.
- To ensure the safety of our employees, volunteers and the general public, any deviation from the company requirements can lead to disciplinary action—up to and including termination.

## INTRODUCTION

The purpose of this written program is to provide administrative and operational guidance to our staff (both paid and volunteers) concerning the safe, effective, and efficient operation of vehicles while operating in the service of the American Red Cross.

This program applies to any and all vehicles used for the benefit of American Red Cross unless otherwise indicated.

Any position referenced in this program indicates the position and any designee.

## ABBREVIATIONS AND DEFINITIONS

BIO – Biomedical Services

DCS – Disaster Cycle Services

DOT – United States Department of Transportation

DVIR – Driver Vehicle Inspection Report

ERV – Emergency Response Vehicle – vehicle used by Red Cross to respond to local and national disasters

FAVR – Fixed and Variable Rate Vehicle Reimbursement

FMC – Fleet Management Company

FMPP – Financial Manual of Policies and Procedures

HS – Humanitarian Services

MVI - Motor Vehicle Incident - an occurrence involving a motor vehicle that produces unintended injury, death or property damage. Motor vehicle collisions are an example.

MVIR - Motor Vehicle Incident Report Form

MVR – Motor Vehicle Record

PIN – Personal Identification Number

SCU – Self-Contained Unit – “bloodmobile” – mobile work site typically in a bus used to collect blood

Staff – employees and volunteers that work in service to American Red Cross

VIN – Vehicle Identification Number

## ORGANIZATION AND RESPONSIBILITIES

- All staff governed by this program are responsible for meeting and maintaining the standards set forth herein.
- Line of Service Operational Management will:
  - Implement, maintain, and administer the Program.
  - Ensure that the process for motor vehicle reviews is developed and implemented.
- Regional Management or Designee will:
  - Ensure that drivers complete the required MVR consent using either an electronic or paper version of *Attachment 12 – Motor Vehicle Consent Form* unless state law requires otherwise.
  - Ensure only approved drivers are used to drive vehicles in service to the American Red Cross.
  - Assist in investigation and review of all incident reports involving a motor vehicle used in performing organization business.
  - Notify region staff responsible for driver qualification of any suspensions, restrictions, or revocations reported by staff to the supervisor. Note that the suspension, restriction, revocation or other loss of license will result in immediate suspension of American Red

- Cross driving privileges. The driver will not be permitted to drive a Red Cross vehicle or their own vehicle in service for the Red Cross.
- Remove driver from driving tasks if that driver's ability to safely operate a motor vehicle is impaired by prescribed or over-the-counter medication, illness, or injury.
- Drivers will:
    - Operate the motor vehicle in a safe manner in accordance with this program and applicable federal, state and local regulations.
    - Maintain a valid driver's license from the state in which they reside.
    - Maintain auto liability insurance that, at a minimum, complies with state insurance requirements if using a personally owned vehicle in service of American Red Cross. Auto liability insurance for Red Cross owned and leased vehicles is maintained by Red Cross Risk Management.
    - Immediately notify their supervisor if involved in an incident or if receiving a citation while operating a vehicle in service to Red Cross.
    - Maintain assigned vehicles according to established maintenance standards.
    - Notify their supervisor within 24 hours if their license is suspended, restricted, revoked, or expired. Under no circumstances will a Red Cross vehicle be operated by someone with a suspended, revoked, or expired license.
    - Notify their supervisor when their ability to safely operate a motor vehicle is impaired by prescribed or over-the-counter medication, illness, or injury.
  - Talent Acquisition will:
    - Obtain and evaluate motor vehicle record on all new hires whose job position requires a MVR review. Use *Attachment 1 Applicant Motor Vehicle Record (MVR) Review Form* to guide your evaluation. Use *Attachment 2 Incumbent Motor Vehicle Record (MVR) Review Form* for incumbent staff.
    - Ensure applicants being considered for positions requiring MVR review must have a MVR score of 20 points or less.
    - Ensure applicants whose MVR review results in a "Not Qualified" classification may not be considered for employment in a position requiring MVR review.
    - Maintain completed initial MVR review with other new hire background check paperwork.

## VEHICLE PRACTICES

### I. Procurement

- a. Standardized configuration and options are available at:  
[https://intranet.redcross.org/content/redcross/categories/business\\_administration/supply\\_chain\\_realestate/fleet-management.html](https://intranet.redcross.org/content/redcross/categories/business_administration/supply_chain_realestate/fleet-management.html)
- b. Additional equipment options are required to be approved by operational and financial approval authority
- c. The standard vehicle decal design is purchased through authorized vendors only. The FMC is the primary source for vehicle decals.
- d. If a vehicle is purchased outside of the FMC, a vehicle inventory load form must be completed and provided to the FMC. The inventory load form is available at the Fleet Management Hub on The Exchange linked above.
- e. Replacement policy –
  - i. Vehicles can be replaced when the established replacement criteria are met.
  - ii. Vehicles are replaced on a one for one basis.
- f. The Procurement process is available at:  
[https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/supply\\_chain\\_realestate/fleet-management/vehicle-purchase-process.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/supply_chain_realestate/fleet-management/vehicle-purchase-process.pdf)
- g. Line of Service specific practices may apply to the vehicle procurement process. Contact your Director of Operations/ Fleet for further guidance.
  - i. Justification with PRT (project request transmittal) – Biomed only
- h. All vehicle orders must be submitted to National Fleet or through Ariba/Request.  
[https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/supply\\_chain\\_realestate/fleet-management/request-create-element-requisition.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/supply_chain_realestate/fleet-management/request-create-element-requisition.pdf)

### II. Donated Vehicles

- a. Only solicit for vehicles on capital list posted on The Exchange. Coordinate with National Development first.
- b. In-Kind, cash, or grant.
- c. Further guidance is available on The Exchange  
<https://intranet.redcross.org/content/redcross/categories/outreach/fundraising/core-donor/vehicle-donation-program.html>

### III. Vehicle Transfer Process

- a. Transfer of vehicles is approved by the approval authority at the location releasing the unit and the approval authority at the receiving location accepting the transferred vehicle.
- b. Vehicle transfer within the organization occurs when a vehicle is moved between different Red Cross locations, regardless of lines of service or region.
- c. If assistance is required to move the vehicle, request a move quote by submitting the following to the Fleet Management Inquiries mailbox:
  - i. Unit # and VIN
  - ii. Pick-up location along with point of contact and phone number
  - iii. Delivery location along with point of contact and telephone number
  - iv. Fleet Management will obtain trucked and driven quotes from 3 transporters.
- d. Once the move has been completed, the new location of the vehicle and GL coding must be communicated to the FMC.

- i. Complete a [Fleet Data Change Request form](#) found on the Fleet Management Hub and email it to [fleetdatachanges@redcross.org](mailto:fleetdatachanges@redcross.org). The Fleet Analytics team will review the form for accuracy and submit the change form to the FMC and to the fixed asset group at SSC for upload into the respective databases.
- e. The vehicle maintenance records will also be transferred with the vehicle to the receiving region.

#### **IV. Vehicle Rentals/ Lease**

- a. A preferred vendor listing is available from sourcing.
- b. Decline the purchase of insurance coverage as this is provided for leased vehicle through the American Red Cross Risk Management Insurance Program
- c. Biomedical Units
  - i. Leases must be approved by Finance
  - ii. Long Term Rentals (over 30 days) only done with approval from Fleet Director
  - iii. Short Term Rentals are approved at the local level
- d. Humanitarian Services
  - i. Leases must be approved by Finance and Supply Management Fleet Operations
  - ii. Rentals will be done in accordance with FMPP 1.1 & 7.1a. Financial and operational authority is determined by the operational need of the rental
    - 1. [https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/accounting\\_finance/financial\\_policiesprocedures/fmpp-1-1.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/accounting_finance/financial_policiesprocedures/fmpp-1-1.pdf)
    - 2. [https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/accounting\\_finance/financial\\_policiesprocedures/fmpp-7-1a.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/accounting_finance/financial_policiesprocedures/fmpp-7-1a.pdf)

#### **V. Vehicle Disposal**

- a. A vehicle is deemed ready for disposal if a repair quote exceeds the value of the vehicle, or it has reached the threshold for disposal per Red Cross guidelines.
  - i. Any vehicle deemed to be ready for disposal should be reviewed by the local Fleet Contact and approved by the Transportation Manager or Chapter COO/CAO
  - ii. The location should follow the steps below in disposing of a vehicle:
    - 1. Submit a request through the FMC with the Unit and VIN to be disposed of. The FMC will place the unit in Unassigned status and cancel the fuel/service card. Upon receipt of the proceeds for the sale of the vehicle, SSC Fixed Assets will notify the FMC to move the unit from Unassigned status to Sold status.
    - 2. The fuel card should be destroyed by the location after notification to the fleet management company of the vehicle disposal.
    - 3. The unit should be readied for pickup by removing all Red Cross equipment. The license plate should also be removed and either returned to the local DMV or deposited in a recycle container to be destroyed. In some cases the DMV may return a partial credit for the unused portion of the tag renewal.
      - a. The disposal vendor is responsible for removal or Red Cross decals and markings.
  - iii. After our FMC receives the request, Fleet Management will be notified to confirm where the title should be mailed. Fleet Management may choose to

sell the vehicle at retail, for optimum return value; or if the disposal is a specialized unit, find an alternate vendor to market the sale.

- iv. Local sales are not permitted unless the salvage value of the vehicle exceeds the cost of transportation or the fair market value of the vehicle.
  - v. Direct sales to Red Cross staff are not permitted.
  - vi. Purchases through the FMC are permitted.
  - vii. Approved transfers to non-profits engaged in services that support the mission of the Red Cross are permitted.
  - viii. If the disposal is assigned to a disposal vendor, the local Fleet Contact will be asked to submit an online request to the vendor providing the pickup address, Point of Contact and drivability of the unit.
  - ix. The transport company will call the local Fleet Contact to schedule in advance a convenient time to pick up the unit. They should have paperwork with the VIN to identify the unit being picked up. The local office is not allowed to change disposal vehicles with the transporter.
  - x. If the local office retains any vehicle titles, they should be overnighted to our FMC as soon as possible. A vehicle title should never be given to the transport company, as it allows greater chance for it to be lost in transit.
  - xi. SSC Fixed Assets will notify the local office to submit a signed Fixed Asset Retirement Form 1454C to ensure the alignment of both databases is maintained. The form is located at [https://intranet.redcross.org/content/redcross/categories/business\\_administration/accounting\\_finance/finance\\_forms/directory-of-finance-forms-.html](https://intranet.redcross.org/content/redcross/categories/business_administration/accounting_finance/finance_forms/directory-of-finance-forms-.html)
  - xii. Proceeds from Sales – Any proceeds from the sale of a disposal will go back to the GL Breakdown who owned the asset.
- b. If a vehicle has been determined to be a total loss as the result of an incident, Sedgwick, in their role as the Red Cross Third Party Claim Administrator, will assist the local Fleet Contact and provide direction on the claim and vehicle disposal.
- i. Sedgwick will also manage the pickup and sale of the totaled vehicle.

#### **VI. Safeguarding Vehicle (locking, parking, key storage)**

- a. Lock all vehicles whenever the vehicle is parked
- b. Vehicles may be parked at pre-determined authorized deployment staging sites.
- c. The driver is responsible to secure the vehicle, not leave valuables in view, and to take steps to minimize risk to the vehicle.
- d. Vehicles should not be left unattended while running.
- e. A process to control assignment of keys must be established at each location.
  - i. Keys can only be assigned to authorized drivers
  - ii. The fuel card assigned to the vehicle is issued concurrently with the keys for that vehicle.
  - iii. Spare fuel cards may be maintained and used when needed for rental and leased vehicles and in limited circumstances where operational needs require them.

#### **VII. Vehicle Cleanliness –**

- a. Staff using company vehicles shall ensure that, upon their return, the interior is neat and clean.
- b. Regions will use the nationally contracted service for vehicle washing if available in their area.

## **VIII. Vehicle Idling**

- a. Vehicles with their engines running and transmission in park, which normally occurs in parking lots and businesses, are considered “idling”. In other words, the engines are running without any load other than the engine accessories.
- b. Red Cross vehicles should not be kept idling for greater than 5 minutes.
  - i. Most vehicles do not require idling for any amount of time
  - ii. All vehicles are to be shut off immediately upon parking in an enclosed area, regardless of loading/unloading situation.

## **IX. Pool Vehicles**

- a. Vehicles are pooled and not personally assigned– includes BIO, Disaster, and HS vehicles. ERVs have a priority use for Disaster Relief and Response. Disaster Action Teams (DAT) should have a vehicle available for immediate, on call responses, 24/7. It does not need to be an ERV. Most vehicles in the organization can be utilized for the initial response. SCUs remain specialized and not included in the pool.
- b. Pool vehicles are vehicles used as loaners. They are to be used by staff as needed to travel to job related functions such as meetings and training. Vehicles will be scheduled on a first come first serve basis. Each local Fleet Contact will have a list of these vehicles, a request form and a means of tracking projected usages and availability.
- c. Although all Vehicles are Red Cross Assets not all vehicles can be shared across department lines or between Chapter and Blood Region. We have some unique vehicles such as Self Contained Units (SCUs) for blood collections that are uniquely designed for a specific purpose. These vehicles must remain with their intended users.
- d. There are other vehicles such as trailers that are packed with disaster supplies that should not be considered as loaners. In the Blood Regions there are new ProMaster vans that are packed according to special guidelines. These can be used on a limited basis as very short term loaners if they can remain packed and are not scheduled to go on a drive.
- e. The scheduling system used by both Chapter and Blood Regions must take into consideration the special vehicles and priority must be given for disaster relief as much as possible.

## **X. Vehicle Fueling**

- a. Each authorized driver of an American Red Cross Vehicle will be issued a “fuel pin” to be used for refueling and minor maintenance charges that occur during the normal course of operations.
  - i. Disaster Cycle Services may use a limited number of PINs for multiple drivers.
    1. These pins are updated annually.
    2. The Chief Operations Officer(COO), Chief Administrative Officer(CAO) or designee will provide the pin.
  - ii. PINs are issued only to drivers that will fuel the vehicle.
  - iii. The local fleet contact will deactivate the pin when the employee/ volunteer driver is no longer active with the organization.
- b. This PIN will be obtained by the Fleet Department through an e-mail using the online FMC Request Center by the local fleet contact. After the PIN is received by the fleet contact, they will provide the number to the staff driver in a secure manner. Information will also be provided to the driver concerning the use, confidentiality, and protection of the pin.

- c. Purchases of fuel and maintenance services using the fuel card provided by our vendor will only be for American Red Cross vehicles and will not be used for personal vehicles. Usage of the fuel card for personal vehicles will be considered theft. The staff person will be subject to disciplinary actions including termination as well as criminal prosecution.
- d. Fuel cards are assigned to a specific vehicle to capture fuel and maintenance charges for only that vehicle.
- e. The fuel card should be maintained in a secure location with the keys when the vehicle is not in use.
- f. The use of the fuel card will require the accurate input of the vehicle's mileage/odometer reading at the time of fueling.
  - i. Mileage readings are used to identify the need for preventive maintenance. Accurate entry of mileage ensures we keep our vehicles in good running condition.
- g. Vehicles are to be fueled with only the lowest grade of fuel (gasoline/diesel) available.
  - i. Pay careful attention to engines requiring diesel fuel.
  - ii. The purchase and amount of fuel that can be acquired is controlled at the "pump" and is only limited by the vendor (normally \$75.00).
- h. Spare fuel cards are controlled by the local Fleet Contact.

## **XI. Vehicle Inspections**

- a. Pre trip and post trip inspections will be conducted and documented by the driver prior to and immediately after operating the vehicle.
  - i. *Attachment 3 Driver Vehicle Inspection Report (DVIR)* is a form that can be used for documenting these inspections.
  - ii. Other suitable forms are available on the Exchange Fleet Management page.
    - 1. The local Fleet Contact will maintain the completed forms for 3 months from date of creation.
  - iii. Electronic inspection forms will be approved for this use when available.
- b. It is recommended that local Fleet Contacts ensure that the fleet vehicles on the premises are visually inspected on a daily basis and ensure that they visually inspect each vehicle in their area at least twice a week, and no less than once per month.
- c. If safety concerns are identified, these concerns must be brought to the attention of the local Fleet Contact/designee.
  - i. If the concerns cannot be immediately resolved, the vehicle must be removed from operation until such items are repaired.
  - ii. Deficiencies which affect the safe operation of the vehicle during operations **must be removed from service and repaired prior to returning the vehicle to service.**

## **XII. Vehicle Maintenance**

Vehicle maintenance is categorized as either preventive maintenance or corrective maintenance.

### **a. Preventive Maintenance**

- i. Preventive maintenance consists of scheduled servicing, inspections and vehicle repairs to prevent potential problems and to maximize vehicle operational availability. All preventive and corrective maintenance is tracked, administered, and paid for through our fleet management company (FMC). All work is completed by a licensed mechanic approved by the FMC. The FMC

maintains a complete listing of all of our vehicles and has established interval servicing criteria so that the fleet and its maintenance costs are both warranted and justified.

- ii. Specialty vehicles (ERVs and SCUs) may require a different approval and completion process for maintenance.
  1. ERVs should be driven at least 100 miles per month for preventive maintenance reasons.
- iii. Established Parameters for Preventive Maintenance on American Red Cross Vehicles:
  1. The American Red Cross, along with our FMC has established parameters for preventive maintenance in their electronic database. The program description is available at [https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/supply\\_chain\\_realestate/fleet-management/element-vehicle-maint-prog.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/supply_chain_realestate/fleet-management/element-vehicle-maint-prog.pdf)
  2. Maintenance schedules are set based on mileage, time, or a combination of both. This information is available from our FMC.
  3. This database is maintained by input from each and every fuel purchase made for an American Red Cross Vehicle using the fuel card System. The input is used to provide a “trigger-point” to identify when a vehicle is due for service.
  4. After service is completed and annotated in the FMC system by the vendor providing this service, the counter for mileage is re-set for the next service interval for preventive maintenance.
- iv. Set up of Weekly Report from FMC on Red Cross Vehicles coming due for preventive maintenance action(s).
  1. Our FMC provides the ability for the American Red Cross to receive a report titled “Notification—Schedule PM Detail” of all vehicles located within a set parameters of the regions.
    - a. The local Fleet Contact will set up the delivery of the report from our FMC.
    - b. The time period covered in the report and frequency of the report is determined locally. A minimum frequency of monthly is recommended.
  2. It is the responsibility of the local vehicle management to schedule the maintenance required to maintain American Red Cross Vehicles in a state of operational readiness to perform their mission.
  3. Should warranty work be needed, it will be the responsibility of the local fleet contact to both notify the staff and schedule the work to be done by the closest vendor.
  4. The local Fleet Contact should communicate changes in vehicle availability to all impacted departments.
  5. Preventive maintenance (lube, oil, filter) will be completed a minimum of twice per year on six month intervals.
- v. Preventive maintenance of an American Red Cross Owned or Leased Vehicle under Maintenance Contract
  1. Vehicles may have a contracted maintenance program provided.
  2. The local Fleet Contact will work with the maintenance provider to schedule these vehicles for their routine maintenance.

3. For leased/ rental vehicles –
  - a. Should a vehicle require maintenance due to a break- down that is not linked to misuse of the vehicle, the leasing company will assume responsibility for the cost of repair.
  - b. If the vehicle is damaged due to misuse or negligence on the part of the driver, the repair will be charged to the American Red Cross.

**b. Corrective Maintenance**

- i. Corrective maintenance is the repair of the vehicle when a problem or concern is either raised or observed by the driver. This information can be conveyed to the local Fleet Contact using *Attachment 3 Driver Vehicle Inspection Report (DVIR)*.
- ii. If repairs are required, the local Fleet Contact contacts the FMC to review the concern and arrange resolution.

**c. Roadside Assistance and Repair Authorization**

- i. Each American Red Cross Vehicle is issued a fuel card that has located on the top right side a telephone number (1-888-525-4691) to call in the case of an emergency. Located on this card is also the last eight digits of the Vehicle Identification Number (VIN) followed by a slash mark and then the five digit number that indicates the vehicle number within the FMC's system.
- ii. The FMC has also provided Red Cross a plastic "cling" (*Attachment 4 – Vehicle Window Cling*) that contains the emergency number and vehicle number. The cling is normally mounted on the inside of the windshield in the upper left hand corner.
- iii. Roadside Assistance for vehicle breakdowns/assistance:
  1. The American Red Cross contract with our vendor provides both on-road vehicle repairs and towing services of all of our vehicles. Drivers, upon an incident occurring and after they are considered "safe" and not in need of medical or any other emergency assistance can use the 1-888-525-4691 provided by our FMC to acquire help in either the repair of their vehicle or towing assistance to the nearest repair facility.
- iv. Timeline Parameters for Roadside Assistance:
  1. To access roadside assistance, the driver will be required to call our FMC at 1.888.525.4691 to begin the process. The current wait time parameter is sixty (60) minutes for service to arrival at the site. The maximum wait time for service should be no longer than ninety (90) minutes.
- v. Use of 'Hiking' Services in moving Red Cross Vehicles to repair facilities.
  1. "Hiking" is defined as a local move of the vehicle using a driver provided by a vendor.
  2. The American Red Cross, through its network of service providers that are part of the FMC list of authorized vendors, can and will provide services to transport American Red Cross Vehicles to and from service centers throughout the nation. The charges for "Hiking" these vehicles is monitored and authorized by our vendor.
  3. Those specific vehicles (SCUs) now under the Penske Maintenance Agreement are also covered for this service as well.
- vi. Levels of repair authorization of a Red Cross Vehicle:
  1. Vehicle Repair cost approval levels

- a. Up to \$100 – driver (using fuel card)
- b. Up to \$1000 –
  - i. Biomedical - fleet coordinator authorized by budget holder
  - ii. Humanitarian Services – the Fleet Management Company
  - iii. National ERV's - the Fleet Management Company
    - 1. Paint and vehicle modifications require NHQ Disaster Logistics approval
- c. Over \$1000 –
  - i. Biomedical – Transportation Manager (up to \$3000), Fleet Director above \$3000
  - ii. Humanitarian Services – fleet contact authorized by budget holder
  - iii. National ERV's – NHQ Disaster Logistics

### **XIII. Insurance documentation**

- a. Vehicle insurance identification cards are distributed annually in July by the Red Cross insurance broker, Marsh. They are sent to contacts (specified by Fleet Management) at central locations within Red Cross; these recipients, in turn, send the cards to the individual locations where they are placed in the Red Cross vehicles by the Fleet Department.
- b. During the fiscal year, new or replacements cards can be requested from Gregory Rankin, Risk Management ([gregory.rankin@redcross.org](mailto:gregory.rankin@redcross.org) and/or 202-303-7809).
- c. The MCS-90 form for DOT regulated vehicles is sent by Marsh to the DOT Compliance Center and maintained by the DOT Compliance Center.

## **DRIVER PRACTICES**

### **I. Vehicle Usage**

- a. American Red Cross vehicles are only driven by staff authorized to drive them by the Red Cross.
- b. Authorized Driver is defined as “staff that has been judged qualified to drive on behalf of Red Cross by virtue of Defensive Driver training, Motor Vehicle Report (MVR) review, and applicable road test”.
  - i. The driver managers are responsible for tracking which staff are authorized to drive vehicles in service to Red Cross.
  - ii. An online fleet administration application is used to track all authorized drivers who drive on a regular basis.

### **II. Driver Qualification**

- a. Any staff driving an American Red Cross vehicle require the following:
  - i. Valid License -
    - 1. American Red Cross drivers must have a valid driver’s license issued from their state of residence as required by state law without conditions or restrictions limiting hours or destination of driving, or requiring the presence of a fully licensed driver.
  - ii. MVR review providing a three year history -
    - 1. Review the staff’s Motor Vehicle Record (MVR) before hire and placement as a driver and thereafter as required by the Red Cross.

- a. The American Red Cross will follow the Motor Vehicle Record review criteria detailed within *Attachment 1 Applicant Motor Vehicle Record (MVR) Review Form* for outside driver applicants.
- b. The American Red Cross will follow the Motor Vehicle Record review criteria detailed within *Attachment 2 Incumbent Motor Vehicle Record (MVR) Review Form* of this program for all incumbent drivers. This review will be conducted through the use of the web-based application.
  - i. In all cases, incumbent driver record reviews will consider the prior three years for review but will only initiate follow-up actions if required for convictions that have occurred since the time of last review.
- iii. Road test for vehicles larger than a passenger car, SUV, or minivan -
  - 1. Ensure the staff is qualified to operate the type of vehicle he/she will drive through the use of a road test and familiarization review.
    - a. A road test by each vehicle type must be completed and documented for all staff that will be driving a Red Cross vehicle other than a passenger car, SUV, or minivan.
      - i. Follow guidance in *Attachment 6 Road Test Directions* and *Attachment 7 Administering the Driver Road Test and Record of Road Test*, in providing and documenting the road test(s).
  - iv. Each driver will be familiarized with the vehicle type to be driven. Familiarization will include:
    - 1. identifying the location of insurance and vehicle registration cards
    - 2. review of vehicle inspection process
    - 3. use of fuel card
  - v. Completion of a Defensive Driving Course accepted by American Red Cross. A computer based training version is available through Red Cross at no additional cost.

### **III. Driver Categories**

All drivers for American Red Cross are categorized based on their MVR review and incident history. A three year look back time period is used for the assignment of driver category. Each conviction and preventable incident on a driver's record (tracked through online driver application) will be scored and used in determining the driver category.

- a. Category 1 drivers have a combination of motor vehicle convictions and motor vehicle incidents that assess a total score of 15 or less.
  - i. Incumbent drivers who are identified as Category 1 will:
    - 1. Continue to drive for Red Cross.
- b. Category 2 drivers have a combination of motor vehicle convictions and motor vehicle incidents that assess a total score of between 16 and 20.
  - i. Incumbent drivers who are identified as Category 2 will:
    - 1. Continue to drive for Red Cross.
    - 2. Require an annual review of their MVR
- c. Category 3 drivers have a combination of motor vehicle convictions and motor vehicle incidents that assess a total score of between 21 and 25.
  - i. Incumbent drivers who are identified as Category 3 will:
    - 1. Attend an external provided Defensive Driving course within 30 days of

- Category assignment as a corrective action.
- 2. Continue to drive for Red Cross.
- 3. Require a semiannual review of their MVR.
- d. Category 4 drivers have a combination of motor vehicle convictions and motor vehicle incidents that assess a total score of 26 or more.
  - i. Incumbent drivers who are identified as Category 4 will:
    - 1. Lose their American Red Cross driving privileges.
    - 2. An evaluation of the staff's ability to continue in current work assignment will be conducted by Human Resources and the driver's Department Management.
    - 3. This program does not prohibit the re-assignment of a staff person to a work assignment that does not require driving for the organization.
- e. Return of Driving Privileges - For drivers scored as Category 4 in our fleet program, the following process will allow the driver to regain their driving privileges.
  - i. Driver is notified of determination of Category 4 scoring.
  - ii. Driver is removed from driving.
  - iii. Driver is assigned Defensive Driving Course (DDC). Acceptable DDCs are limited to courses from AAA, AARP, JJ Keller, or National Safety Council. The driver remains removed from driving until successful completion of the DDC.
  - iv. Driver is counseled with written confirmation to driver and personnel file of possible consequences of future violations and preventable incidents. Human Resources will be notified of counseling.
  - v. Driver completes the DDC program.
  - vi. The DDC course completion certificate will be uploaded to the driver's file.
  - vii. A point reduction event will be added to the driver's record in E-driver for a maximum of 20 points. The reduction event is dated the same as the oldest scored conviction on the driver's record. The overall driver's score will not be reduced below 21 points.
  - viii. The driver's revised category will be Category 3.
  - ix. The DDC reduction event can only be used once per every 2 years.

#### **IV. Operating/Driving vehicles while intoxicated or under the influence**

- a. The loss of license from an alcohol or drug related stop will result in suspension of American Red Cross driving privileges. The driver will not be permitted to drive a Red Cross vehicle or their own vehicle in service for the Red Cross.
  - i. A drug or alcohol conviction in a Red Cross vehicle (before, during, or after work hours) or personal vehicle while in service for Red Cross will result in a three year loss of Red Cross driving privileges with no reinstatement possible within the three years.
  - ii. The first drug or alcohol conviction in a personal vehicle while not in service to Red Cross will allow for possible reinstatement of driving privileges after the staff person has regained full driving privileges by their state of residence if the staff person is still employed or an active volunteer.
  - iii. A successful MVR review resulting in a category 1, 2, or 3 rating will be required prior to driving privileges being restored to the driver.
  - iv. Subsequent drug or alcohol convictions in personal vehicles while not in service to Red Cross will result in loss of driving privileges for three years following conviction.
- b. An evaluation of the staff's ability to continue in their current work assignment will be

- conducted by Human Resources and the driver's Department Management.
- c. This program does not prohibit the re-assignment of a staff person to a work assignment that does not require driving for the organization.
  - d. Drivers regulated as commercial motor vehicle drivers will be managed per Federal Motor Carrier standards concerning drug or alcohol convictions.

#### **V. Driver Specific Practices**

- a. Red Cross vehicles will be used only for authorized company business.
- b. There shall be no unauthorized passengers in company vehicles at any time.
- c. Staff members are prohibited from using motorcycles/ mopeds for transportation on organization business other than for commuting purposes.
- d. Smoking and the use of all tobacco products, including e-cigarettes, including owned and leased vehicles, is prohibited. Further prohibitions on tobacco use may apply as required by local regulations, policy or practice.
- e. Drivers should refrain from eating while operating the vehicle.
  - i. Containers of liquids will have a top
  - ii. If eating is required in the vehicle, all resulting trash will be removed from the vehicle at the end of the day. All occupants of the vehicle should help in this daily "housekeeping".
- f. Staff are not permitted to:
  - i. Pick up hitchhikers.
  - ii. Accept payment for carrying passengers or materials.
  - iii. Use any radar detector, laser detector or similar devices.
  - iv. Push or pull another vehicle or a non-organization trailer.
  - v. Jump start any vehicle without prior familiarization jump start procedures and approval by local authority. Refer to *Attachment 5 - Battery Jump Start Instructions*.

### **SAFETY**

#### **I. General**

- a. The driver and all occupants are required to wear seat belts/ applicable safety restraints when the vehicle is in operation. The driver will not place the vehicle in gear until all passengers and the driver have fastened their seat belts/ safety restraints.
  - i. Seatbelts used must be rated for highway passenger restraint.
- b. No driver may operate a motor vehicle when his/her ability to do so is impaired by fatigue, alcohol, illegal drugs, prescribed or over-the-counter medication, illness, or injury or any other cause.
- c. Drivers must abide by the federal, state and local motor vehicle regulations, laws and ordinances.
- d. Drivers are responsible for ensuring the vehicle is in a safe operating condition prior to driving.
- e. Staff will ensure that all lifts and ramps attached to the vehicles will be used in a safe manner and in accordance with manufacturer's recommendations.
- f. No staff while operating a Red Cross vehicle, or while driving his or her personal vehicle on Red Cross business, may use hand-held communication devices or other hand-held mobile electronic devices. This includes equipment such as cell phones, Blackberries, iPhones, iPads, electronic tablets, e-books and GPS. Communication devices must be operated via a hands-free device.

- i. Text messaging, emailing, or adjusting a Global Positioning System (GPS) is prohibited while the vehicle is in motion or temporarily stopped due to traffic, a traffic control device, or other momentary delay.
- ii. These restrictions do not apply to calls made to report an emergency.
- iii. All drivers must comply with local, state, and federal laws pertaining to cellular telephones and other electronic devices while operating a vehicle.
- iv. Failure to do so will result in disciplinary action, up to and including termination of employment.
- v. If a hands free device is not available, vehicle must be safely stopped out of traffic before continuing communication or other use of the electrical device.
- vi. Use of headphones/ headsets is prohibited for drivers.
- g. It is recommended that all Red Cross vehicles, or personal vehicles in use for Red Cross business, will be driven with their headlights on at all times.

## II. Vehicle Incidents

If there are fatalities, injuries requiring more than first aid, or vehicle fluids released as a result of the collision, call 911.

For all incidents, follow these steps:

- a. Turn on vehicle hazard lights,
  - i. If scene is not safe, STAY IN vehicle, contact 911 for assistance
- b. If struck by another vehicle that does not remain at the scene (Hit and Run),
  - i. Do NOT attempt to follow or chase the other vehicle, contact 911,
  - ii. When safe to do so, document any information possible about the other vehicle (make, model, color, license tag, identifying markings, etc...)
  - iii. Include the description of the other vehicle in your report.
- c. If incident is minor, move vehicles to a safe place, out of traffic,
- d. Gather information from other driver, passengers and witnesses,
- e. Obtain and exchange insurance information,
- f. Obtain information on other vehicles or property involved, get pictures when possible,
- g. Cooperate with authorities,
- h. Limit communications. Do not make statements to anyone other than the police officer.
- i. Report the incident to your supervisor before leaving the scene
  - i. Failure to report an incident will result in progressive discipline up to and including termination of employment or termination of association with the organization as a volunteer.
  - ii. For roadside vehicle assistance, drivers can use the 1-888-525-4691 provided by our FMC to acquire help in either the repair of their vehicle or towing assistance to the nearest repair facility.
- j. Report the Auto Claim - Claims should be reported as soon as possible following an incident.
  - i. The driver should report the Motor Vehicle Incident directly to the Insurance Claim Administrator (Sedgwick) by calling 1 800 272-7988.
- k. Complete *Attachment 10 - Motor Vehicle Incident Report Form*
  - i. An expanded *Motor Vehicle Incident Report* form suitable for gathering information is located on the Claims Topic Hub on The Exchange: [https://intranet.redcross.org/content/dam/redcross/documents/business\\_administration/risk-management/claims/mva-report.pdf](https://intranet.redcross.org/content/dam/redcross/documents/business_administration/risk-management/claims/mva-report.pdf)

- ii. **Avis Vehicle Rentals:** Information concerning Avis rentals and claim reporting can be found here:  
[https://intranet.redcross.org/content/redcross/categories/business\\_administration/supply\\_chain\\_realestate/fleet-management/fleet-safety.html](https://intranet.redcross.org/content/redcross/categories/business_administration/supply_chain_realestate/fleet-management/fleet-safety.html)
- l. Completed Motor Vehicle Incident Reports (MVIR) must be sent to [MVIR@redcross.org](mailto:MVIR@redcross.org).
- m. For vehicles determined to be a total loss, refer to the vehicle disposal section of this document for directions.

### III. **Incident review**

- a. Each Motor Vehicle Incident involving a Red Cross operated vehicle will be reviewed by the Red Cross to determine the preventability of the incident.
- b. *Attachment 8 - Motor Vehicle Incident Review Guidelines* identifies roles and responsibilities for Motor Vehicle Incident Review.
- c. *Attachment 9 - Guide for Preventability Decisions* lists the determination questions used to assign a preventability decision.
- d. *Attachment 13 – Motor Vehicle Incident Review Determination form* can be used to document the decision of preventability.
- e. The determination of preventability will be communicated to the driver’s management.

### IV. **Vehicle Fluid Spill Reporting**

- a. The Red Cross has a regulatory obligation to report fluid spills such as fuel, antifreeze, motor oil, brake fluid or other hazardous substances which leak from Fleet vehicles into the environment. Fluid spills resulting from a motor vehicle incident or breakdown shall be immediately reported to your supervisor and local emergency services (911) once the driver is “safe” and not in need of medical or emergency assistance. Do not attempt to clean a spill by yourself. Additional reporting to State Officials may be required based on type and amount of spill. The driver or driver’s supervisor will report the spill to the local Fleet Contact who will provide the information to Safety if required.

### V. **Fines & Penalties**

- a. Drivers of Red Cross vehicles may be cited and fined while operating the vehicle in service to Red Cross. The cause of the citation will decide who is responsible for paying the fines if any associated with a citation.
- b. Payment of Fines
  - i. Citations and any associated fines that result from actions wholly on the part of the vehicle driver will be the responsibility of the vehicle driver to pay. Examples of this include speeding and other moving violations, failure to maintain records of duty status, driving a vehicle with an unaddressed safety issue reported on the previous vehicle inspection form, and violating an out of service order.
  - ii. Citations and any associated fines that result from actions in control of American Red Cross will be the responsibility of the Red Cross to pay. Examples of this include improper vehicle marking, inoperative equipment reported on a vehicle inspection form prior to the vehicle being driven, and failure to maintain vehicle periodic inspection documentation.
- c. This guidance does not indicate that Red Cross may require a driver to drive a vehicle that has defective equipment that may result in traffic citation or out of service order.
- d. The responsibility for payment of fines is subject to review by local management.

## MISCELLANEOUS

### I. Related Policies

- a. Financial Policies are located in the *Financial Manual of Policy and Procedures* (FMPP). The FMPP is accessible on the Financial Policies and Procedures hub on The Exchange - [https://intranet.redcross.org/content/redcross/categories/business\\_administration/accounting\\_finance/financial\\_policiesprocedures.html](https://intranet.redcross.org/content/redcross/categories/business_administration/accounting_finance/financial_policiesprocedures.html)
  - i. Any staff person enrolled in the Fixed and Variable Rate Vehicle Reimbursement (FAVR) Program is not eligible to be assigned a Red Cross pool vehicle. The FAVR program is located in the FMPP.
  - ii. The Red Cross Travel policy (*Staff Expense Reimbursement Policy and Procedure Manual*) is located in the FMPP.
- b. Fleet policies and procedures are located in the Fleet Management Topic hub on The Exchange – [https://intranet.redcross.org/content/redcross/categories/business\\_administration/supply\\_chain\\_realestate/fleet-management.html](https://intranet.redcross.org/content/redcross/categories/business_administration/supply_chain_realestate/fleet-management.html)
  - i. A decision tool to assist chapters in deciding between using fleet vehicles, personal vehicles, or rental vehicles is located in the guidance document titled *Centralized Fleet Management, Optimization and Procurement Framework*. This document is located in the *Fleet Management* topic hub.

### II. Department of Transportation (DOT Program)

- a. The American Red Cross DOT Compliance Program applies to all Red Cross employees, volunteers, temporary staff and any other operators of a Commercial Motor Vehicle (as defined by the Federal Motor Carrier Safety Regulations) owned by or in service to the Red Cross.
  - i. The Biomedical DOT Compliance Program is housed on a SharePoint site located at the following URL: <http://goo.gl/Wdpku>
  - ii. The Humanitarian Services/ Disaster Services DOT Compliance Program is under development.

### III. Ramp Outfitted Vehicles

- a. Lift Gate and Ramp Selection guidance is located at: <https://neighborhoods.redcross.org/FSN/EHSPolicy/Shared%20Documents/006%20-%20Fleet%20Safety%20Management/Lift%20Gate%20and%20Ramp%20Selection%20Criteria%202016-01.pdf>

### IV. Fraud, Waste, and Abuse

- a. The Office of Investigations, Compliance and Ethics (ICE) is responsible for coordinating all fraud investigations and follow-up actions for the Red Cross.
  - i. This includes all instances where there is actual fraud or the suspicion of possible fraudulent or unauthorized actions/transactions.
  - ii. This office maintains a working relationship with local, state and federal law enforcement agencies to include the U.S. Department of Justice Fraud Division and the Federal Bureau of Investigation.
  - iii. The Office of investigations, Compliance and Ethics investigates and where appropriate, prosecutes those committing fraud against the Red Cross.

- b. It is the responsibility of anyone that becomes aware of any suspected fraudulent or improper, non-compliant or suspicious activities to contact the Vice President, Office of Investigations, Compliance and Ethics, (202) 303-4098.
- c. Anonymous reports can be made by contacting the organization's Whistleblower Hotline, the Concern Connection Line either by phone at 1-888-309-9679 or online: <https://www.integrity-helpline.com/RedCross.jsp>

## ATTACHMENTS



**Attachment 1 – Applicant Motor Vehicle Record (MVR) Review Form**  
**(Completed by Talent Acquisition/ Volunteer Services or Local Management)**

Region Name \_\_\_\_\_

DRIVE/APPLICANT NAME \_\_\_\_\_

Last

First

DATE OF THE MVR \_\_\_\_\_

The three most recent years of driving history should be used to evaluate a potential staff member’s driving performance.

Conviction	Points Scored per Violation	No. of Violations	Total Points (No. x Points)	Notes (dates, speeds, incident, etc.)
Any motor vehicle related violation conviction	10			
Speeding less than 15 mph over limit	10			
Speeding 15mph or greater over limit	15			
Previous Suspension of License (for motor vehicle related violations)	10			
DUI conviction	25			
Driving while license suspended	25			
Reckless Driving conviction	25			
Leaving Scene of Accident conviction	25			
	<b>TOTALS:</b>			

MVR Evaluation Categories: Mark the proper category for driver based on total score.

Acceptable: 20 points or less

Not Qualified: More than 20 points. Applicant’s MVR score exceeds allowed total for driving privileges. Applicant may not be considered for employment in a position requiring driving.



**Attachment 2 – Incumbent Motor Vehicle Record (MVR) Review Form**

**(Incumbent Staff only – completed and documented by web-based application)**

Region Name \_\_\_\_\_

DRIVE/APPLICANT NAME \_\_\_\_\_

Last

First

DATE OF THE MVR \_\_\_\_\_

The three most recent years of driving history should be used to evaluate a current staff member's driving performance.

Conviction	Points Scored per Violation		No. of Violations	Total Points (No. x Points)	Notes (dates, speeds, incident, etc.)
Level 1 conviction	5				
Level 2 conviction	10				
Level 3 conviction	15				
Level 4 conviction	25				
Level 5 conviction	30				
*Preventable collisions/incidents in Red Cross Vehicle (or on Red Cross business) within 3 years	1st incident	6			
	Additional Incidents	10 each			
	TOTALS:				

MVR Evaluation Categories: Category selected based on total MVR and incident score

Category 1: 15 points or less

Category 2: More than 15 points, but not more than 20 points.

Category 3: More than 20 points, but not more than 25 points.

Category 4: 26 points or more.

\*Resulting in damage exceeding insurance deductible

\*\* A listing of all conviction codes and their score is available from the Fleet Department



Action taken/recommended based on MVR Review and Category  
(See "Note:" below). Corrective action completed should be documented.

Due Date of Next MVR Review: \_\_\_\_\_  
Reviewer: \_\_\_\_\_

Management Comments:

Reviewed By: (Managers'  
Signature) \_\_\_\_\_  
Review Date: \_\_\_\_\_

**Note: Driver Improvement Procedures**

Category 1: (15 points or less) Driver acceptable for driving.

Category 2: (More than 15 points, but not more than 20 points) MVR Review must be done at least annually. Driver will be counseled verbally with written confirmation to driver and file of possible consequences of future violations and preventable incidents. Human Resources will be notified of counseling.

Category 3: (More than 20 points, but not more than 25 points) MVR Review must be done at least semi-annually. Driver must be counseled verbally with written confirmation to driver and file of possible consequences of future violations and preventable incidents. Human Resources will be notified of counseling. Driver must complete defensive driving course within 30 days.

Category 4: (26 points or more) Driver's MVR exceeds desired total for driving privileges. Driver will not be permitted to drive vehicles in service to American Red Cross.

**Attachment 3 – Driver Vehicle Inspection Report (DVIR)**

**DRIVER VEHICLE INSPECTION REPORT (DVIR)**

American Red Cross– USDOT 845123

DOT Vehicle  non-DOT Vehicle

**PRE-TRIP INSPECTION** **Section A**

Vehicle ID Number: \_\_\_\_\_ Starting Odometer Reading: \_\_\_\_\_

Verify the following are in/on vehicle:  Insurance Card  Vehicle Registration  DOT Numbering

Remarks: \_\_\_\_\_

SAFE OPERATIONAL CONDITION OF ABOVE VEHICLE IS SATISFACTORY  CONDITION OF ABOVE VEHICLE IS UNSATISFACTORY  
(Applies only to defects which affect safe operation of vehicle)

If a SCU, is carbon monoxide detector operational?  YES  NO  NA

If equipped with lift gate, is lift gate operational?  YES  NO  NA

Date: \_\_\_\_\_ Time: \_\_\_\_\_

**POST-TRIP INSPECTION** **Section B**

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Ending Odometer Reading: \_\_\_\_\_

Gen Set Used for this trip:  Gen Set 1  Gen Set 2  NA Was the vehicle refueled?  Yes  No

Check box below only if a defect exists:

- |   |  |  |                                       |  |  |
|---|--|--|---------------------------------------|--|--|
| <input type="checkbox"/> Air Compressor   | <input type="checkbox"/> Defroster/Heater/AC | <b>Lights</b>                            | <input type="checkbox"/> Generator(s) | <input type="checkbox"/> Seat Belt(s)  | <input type="checkbox"/> Windows             |
| <input type="checkbox"/> Air Lines        | <input type="checkbox"/> Door Locks          | <input type="checkbox"/> Headlights      | <input type="checkbox"/> Horn         | <input type="checkbox"/> Starter       | <input type="checkbox"/> Windshield wiper    |
| <input type="checkbox"/> Battery          | <input type="checkbox"/> Engine              | <input type="checkbox"/> Tail lights     | <input type="checkbox"/> Mirrors      | <input type="checkbox"/> Steering      | <input type="checkbox"/> Other               |
| <input type="checkbox"/> Belts and Hoses  | <input type="checkbox"/> Exhaust             | <input type="checkbox"/> Brake lights    | <input type="checkbox"/> Mud Flaps    | <input type="checkbox"/> Suspension    | <b>Safety Equipment</b>                      |
| <input type="checkbox"/> Body Damage      | <input type="checkbox"/> Fifth Wheel         | <input type="checkbox"/> Turn Indicators | <input type="checkbox"/> Muffler      | <input type="checkbox"/> Tire Chains   | <input type="checkbox"/> Fire Extinguisher   |
| <input type="checkbox"/> Brakes (Parking) | <input type="checkbox"/> Fluid Levels        | <input type="checkbox"/> Warning lights  | <input type="checkbox"/> Oil Pressure | <input type="checkbox"/> Tires         | <input type="checkbox"/> Reflector Triangles |
| <input type="checkbox"/> Brakes (Service) | <input type="checkbox"/> Frame/Assembly      | <input type="checkbox"/> Reflectors      | <input type="checkbox"/> Radiator     | <input type="checkbox"/> Transmission  | <input type="checkbox"/> Spare Bulbs / Fuses |
| <input type="checkbox"/> Coupling Devices | <input type="checkbox"/> Front Axle          |  |                                       | <input type="checkbox"/> Wheels / Rims | <input type="checkbox"/> Wheels Chocks       |

Trailer Number: \_\_\_\_\_

- |   |   |                                |                                       |                                     |                                       |
|---|---|--------------------------------|---------------------------------------|-------------------------------------|---------------------------------------|
| <input type="checkbox"/> Brake Connection | <input type="checkbox"/> Coupling Devices | <input type="checkbox"/> Doors | <input type="checkbox"/> Landing Gear | <input type="checkbox"/> Reflectors | <input type="checkbox"/> Tires        |
| <input type="checkbox"/> Brakes           | <input type="checkbox"/> Coupling Pin     | <input type="checkbox"/> Hitch | <input type="checkbox"/> Lights (All) | <input type="checkbox"/> Suspension | <input type="checkbox"/> Wheels / Rim |

Remarks \_\_\_\_\_

SAFE OPERATIONAL CONDITION OF ABOVE VEHICLE IS SATISFACTORY  CONDITION OF ABOVE VEHICLE IS UNSATISFACTORY  
(Applies only to defects which affect safe operation of vehicle)

IF UNSATISFACTORY, NAME OF REPRESENTATIVE CONTACTED \_\_\_\_\_

POST-TRIP Driver's Signature and Red Cross ID: \_\_\_\_\_ / \_\_\_\_\_

**REPAIR DOCUMENTATION (required only for DOT Vehicles)** **Section C**

Above Defects Corrected  Above Defects Need Not Be Corrected For Safe Operation of Vehicle

MECHANIC/Red Cross Designee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

NEXT DRIVER REPAIR VERIFICATION SIGNATURE: \_\_\_\_\_ Date: \_\_\_\_\_



**American  
Red Cross**

**Attachment 4 – Vehicle Window Cling**



All Vehicle Inquiries Call  
(888) 525-4691

Unit # \_\_\_\_\_



### **Attachment 5 – Battery Jump Start Instructions**

Staff are not permitted to jump start any vehicle without prior familiarization jump start procedures and approval by local authority.

1. Do not disconnect the disabled battery – this could damage the vehicle’s electrical system.
2. Do not let the assisting (booster) vehicle and the disabled vehicle touch. Park the boosting vehicle next to the vehicle with the dead battery.
3. Turn off the ignition of both vehicles, set their parking brakes on and set them in P (Park).
4. Turn off all lights, electronic devices and any other items that can drain power (it’s a good idea to remove any portable items plugged into your power outlets as well).
5. Remove any terminal covers and excessive corrosion from the battery terminals before connecting the cables.
6. Clamp the red positive (+) cable onto the disabled vehicle’s red positive (+) battery terminal.
7. Connect the other end of the red positive cable to the booster vehicle's red positive battery terminal.
8. Connect the black negative clamp to the booster vehicle's black negative (-) terminal.
9. Connect the other end of the black negative cable to a large, unpainted metal surface within the engine area of the dead vehicle, away from the battery and the carburetor/fuel injection system. Make sure cables are clear of any possible moving parts.
10. After a final check, start the booster vehicle. Then start the disabled vehicle. Allow them both to run connected for about three minutes.
11. Without turning off the jump-started vehicle’s engine, disconnect the cables in the reverse order that they were attached and close the hoods.
12. Allow the jump-started vehicle’s engine to run for several minutes.



## **Attachment 6 - Road Test Directions**

Prior to driving a vehicle for the American Red Cross, a prospective driver's ability to safely handle the vehicle must be assessed by administration of a road test in a representative vehicle of each type (excepting passenger car, SUV, and mini-van) the driver will be expected to drive for American Red Cross.

Road testing should include exposure to routine road hazards which the prospective driver will likely encounter on a day-to-day basis. This can include urban areas, back roads, alleys, highways, bridges, grades, school zones, intersections, backing, parking, left and right turning, and railroad crossings.

A parking lot test should be established that includes hands-on operation of the vehicle by the prospective driver in a controlled environment.

The route used for the over the road test must allow for a complete assessment of the driver's skills and abilities detailed in the road test form. A varying work route to a job site or a set course may be used to perform the road test. In all cases, the route should be identified before performing the test. A minimum distance traveled of 10 miles is required for each road test.

A qualified driver in the vehicle type being used for the test must assess the prospective driver using the road test form provided.

Road tests will be:

- Administered by an Red Cross staff person (Observer) selected by Local Management or Fleet Management and qualified to operate the vehicle being used for testing;
- Administered for each type of vehicle the prospective driver will be expected to drive other than a passenger car, SUV, or minivan;
- Completed by the Observer and all documentation returned to the driver's department.

Road Test Results:

- 80% or higher of the assessment items checked as "yes" is passing.
- Less than 80% indicates failure; 1 re-test will be permitted on a failed test result unless a preventable collision incident occurred during the test.
- A motor vehicle collision incident determined to be preventable will result in a failed road test.

Staff members will not be allowed to drive company vehicles other than passenger car, SUV, or mini-van until road tested in that vehicle class.



## **Attachment 7 - Administering the Driver Road Test and Record of Road Test**

Red Cross Competent Driver:

You have been assigned to drive & observe a new driver. Prior to being allowed to drive any American Red Cross Vehicle, the new driver is required to pass a Road Test, administered by an American Red Cross experienced driver. You are being asked to perform this observation for this new driver.

Please review the form prior to starting the test.

If this road test is not administered during this drive, the new driver may not be allowed to operate the vehicle on an independent basis. Be sure that the new driver is road tested in both highway and city driving including parking the vehicle. The road test may be administered during your normal travel route by allowing the new driver to drive part of the route with you as an observer.

When administering the road test, please be sure all areas on the form are completed.

Observer must provide the applicant a map or a description of route followed for this road test. The route's description may be written on a separate piece of paper and should be available for review.

### ADMINISTERING THE ROAD TEST

- The license of the new driver is checked to verify that he/she has an appropriate license.
- Driver is provided with a map or description of the course and give instructions.
- Observer conducts a pre-trip inspection with driver.
- Observer familiarizes the driver with the vehicle.
- Parking lot portion of road test conducted.
- Over-the-road portion of road test conducted. (Give directions for the route well in advance to avoid last minute maneuvers, but do not distract the driver with unnecessary conversation en route.)
- Driver conducts a post-trip inspection.

**Record of Road Test**

Driver Name:	Date of Test:	<input type="checkbox"/> Volunteer <input type="checkbox"/> Paid Staff
--------------	---------------	---

Job Title: \_\_\_\_\_

Year, Make, & Model of Vehicle	Vehicle #
--------------------------------	-----------

Observations	Test item demonstrated?			Observations	Test item demonstrated?		
	Yes	No	NA		Yes	No	NA
<b>Starting Vehicle</b>				<b>Turning</b>			
Adjusts seat				Makes sure is in proper lane for turn			
Adjusts side view mirrors				Signals intention well in advance			
Adjust rear view mirrors				Approaches turn at proper speed			
Uses seat belt				Checks traffic conditions and turns only when intersection is clear			
<b>Vehicle Operation</b>				Keeps vehicle in proper lane during turn			
Starts vehicle without grinding starter				<b>Passing</b>			
Maintains proper speed for conditions and within speed limits				Only passes in safe location, where legally permitted			
Maintains 3 second following distance (minimum)				Checks ahead and behind to make sure passing room is adequate			
Checks traffic patterns				Uses directional signals properly			
Does not use hand held cell phone while operating vehicle				Leaves sufficient space before moving back into lane			
Steers smoothly				Does not exceed speed limit			
Drives with both hands on steering wheel							
Obeys traffic signs/ signals							
Does not allow vehicle to roll while stopped							
<b>Intersections</b>				<b>Backing &amp; Parking</b>			
Checks in all directions for traffic conditions				Avoids backing from blindside			
Prepares to stop vehicle if necessary, even if traffic signal is green				Checks area including overhead before backing			
Stops vehicle in proper location				Uses mirrors while backing			
				Stops in correct gear			

<b>Miscellaneous to be completed by the observer</b>	
Driver knows where to find the height of the vehicle	<input type="checkbox"/> Yes <input type="checkbox"/> No
Driver knows where to find the height of a bridge or underpass	<input type="checkbox"/> Yes <input type="checkbox"/> No
Driver was shown how to conduct a pre-trip inspection & complete the form	<input type="checkbox"/> Yes <input type="checkbox"/> No
Driver was shown how to conduct a post-trip inspection & complete the form	<input type="checkbox"/> Yes <input type="checkbox"/> No

Determination of New Driver Road Test Results:  Qualified  Not Qualified

Reasons for Failure in Road Test:  7 or more test items checked as "no"  Preventable collision during test

Allowed to Retest? (After 1 business day)  Yes  No

Printed Name of Competent Driver	Signature of Competent Driver	Date
----------------------------------	-------------------------------	------

Printed Name of Driver	Signature of Driver	Date
------------------------	---------------------	------

## **Attachment 8 - Motor Vehicle Incident Review Guidelines**

The heart of a safe driving program is the careful determination of the preventability of each incident in which a driver is involved. This must be done in the light of all the facts pertinent to the incident's occurrence. Unearthing these facts is sometimes difficult in practice, but can be made easier by training drivers to report the incidents in which they are involved completely and accurately.

National Fleet Administration will perform the functions of determining preventability and recommending corrective actions for motor vehicle incidents.

Each incident reported to American Red Cross will be evaluated and an initial determination made as to the preventability of the incident. For any incident in which the preventability cannot be determined by an initial review, an inquiry for further information will be forwarded to the region. A phone interview with the driver may be needed.

Preventability will be determined based on the guidance in **Attachment 9 - Guide for Preventability Decisions.**

The preventability decision will be communicated to the driver, driver's management, local fleet contact and safety. Documentation of the decision will be added to the driver's incident file.

The preventability decision must be communicated to and reviewed with the driver by the region. The first preventable incident in a three year period must also require mandatory attendance in an online or classroom Defensive Driving Course (DDC) within thirty days of the incident preventability determination communication. Acceptable defensive driving courses are limited to courses from AAA, AARP, JJ Keller, or National Safety Council.

The privilege of a staff member to operate an organization owned/ leased motor vehicle or personal motor vehicle in service to the Red Cross may be suspended after any incident review. The recommendation to suspend must first be presented to the Division Fleet Manager, Division HR Manager, and the Area Safety Director or their designees. A majority decision of the three will decide if the recommendation is followed. The decision will be presented to the driver's Department Director before being presented to the driver. This decision is final.

Decisions of preventability and/ or corrective action may be appealed to the Division HR Manager. All appeals must be reviewed by the Division Fleet Manager, Area Safety Director, and Division HR Manager or their designees. Members of this Appeals Group cannot be the originators of the decision. The decision of this Appeals Group is final.

A list of drivers with suspended driving privileges will be maintained by the organization and available for referral prior to assigning a vehicle to a driver. A database will be maintained for all incidents which will provide necessary information, including the driver's name, date of incident, and determination of preventability.



A report of all incidents will be reviewed at least quarterly for determination of trends in incident causes and types. Follow up actions will be identified by the review team and communicated to the organization as appropriate.

## **Attachment 9 - Guide for Preventability Decisions**

Determinations of incident preventability are based on guidance in this attachment. The determinations will follow the three principles listed below.

1. An incident shall be considered “Preventable” when the operator of the vehicle has failed to do everything reasonable to avoid the incident as defined by the National Safety Council.
2. The incident shall be considered “Non-Preventable” when it has been determined that the operator of the vehicle did everything reasonable to prevent the incident.
3. Those cases resulting from natural forces, from acts by other than human sources, from a deliberate act (e.g., vandalism), from a non-perceivable object (e.g., flying debris on road), or while the vehicle is properly parked also shall be classified as a Non-Preventable incident.

A motor vehicle incident is preventable if the driver could have done something to avoid it. Drivers are expected to drive defensively. Which driver was primarily at fault, who received a traffic citation, or whether a claim was paid has absolutely no bearing on preventability. If there was anything the driver could have done to avoid the collision, then the incident was preventable.

An incident is non-preventable when the vehicle was legally and properly parked, or when properly stopped because of a law enforcement officer, traffic control device, or traffic condition.

If a stationary object is struck, then it is usually a preventable incident. If the driver rear ends another vehicle, then it is usually a preventable incident. It should be noted there are exceptions to any rule, but they are just that – exceptions!

It should be the practice of any person discussing or judging incidents to obtain as many facts as possible and to consider all conceivable conditions. Adverse weather conditions, actions of other drivers, or other such excuses will influence the judgment of preventability. If procedures, scheduling, dispatching, or maintenance out of the control of the driver were found to be factors, that should be taken into account. The organization must take responsibility for the work environment and recognize that drivers cannot control some aspects. It is critical that drivers have the ability to refuse to operate an unsafe vehicle without reprisal from management.

Professional drivers are expected to drive in a manner which allows them to avoid conflicts when they arise. Whether a driver has a 25-year safe driving record or started driving the day before has no bearing on whether an incident was or was not preventable. Taking a fair attitude does not mean leniency. The types of incidents listed below cannot cover every incident which may occur. They are intended to provide guidance in determining the preventability of the reviewed incident.

### **QUESTIONS TO CONSIDER – GENERAL INCIDENTS**

1. Does the report indicate that the driver considers the rights of others or is there evidence of poor driving habits which need to be changed?
2. Does the report indicate good judgment? Such phrases as “I did not see,” “I didn’t think,” “I didn’t



expect,” or “I thought” are signals indicating there is something wrong. An aware driver should think, expect, and see hazardous situations to avoid collisions.

3. Was the driver under any physical handicap which could have been contributory? Did the incident happen near the end of a long and/or hard run? Did the driver get sufficient sleep before the trip? Is the driver’s vision faulty?
4. Was the vehicle defective without the driver’s knowledge? A gradual brake failure, a car which pulls to the left or right when the driver applies the brakes, faulty windshield wipers, and similar items are excuses, and a driver using them is trying to evade responsibility. Sudden brake failure, loss of steering, or a blowout may be considered defects beyond the driver’s knowledge; however, the inspection and maintenance program should work to prevent these hazards.
5. Would taking a route through less congested areas reduce the hazardous situations encountered?

## **QUESTIONS TO CONSIDER - SPECIFIC TYPES OF INCIDENTS**

### **Intersection Collisions**

Failure to yield the right-of-way, regardless of stop signs or lights, is preventable. The only exception to this rule is when the driver is properly proceeding to an intersection protected by lights or stop signs and the driver’s vehicle is struck in the extreme rear, side, or back.

Regardless of stop signs, stop lights, or right-of-way, a safe driver should recognize that the right-of-way belongs to anyone who assumes it and should yield accordingly. In addition, a safe driver is expected to know the turning radius of the vehicle and be able to avoid damaging other vehicles. These incidents are normally considered preventable.

1. Did the driver approach the intersection at a speed safe for conditions?
2. Was the driver prepared to stop before entering the intersection?
3. At a blind corner, did the driver pull out slowly, ready to apply the brakes?
4. Did the driver operate the vehicle correctly to keep from skidding?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE INCIDENT WAS PREVENTABLE.

### **Sideswipes**

Sideswipes are often preventable since drivers should not get into a position where they can be forced into trouble. A driver should pass another vehicle cautiously and pull back into the lane only when he or she can see the other vehicle in the rearview mirror. A driver should also be ready to slow down and let a passing vehicle into the lane. A driver should not make a sudden move that may force another vehicle to swerve.

Unless the driver is swerving to avoid another car or a pedestrian, sideswiping a stationary object is

preventable.

Drivers are expected to be able to gauge distances properly when leaving a parking place and enter traffic smoothly.

A driver is expected, whenever possible, to anticipate the actions of an oncoming vehicle. Sideswiping an oncoming vehicle is often preventable.

The doors of a vehicle should never be opened when it is in motion and should not be opened on the traffic side, unless clear of traffic, when it is parked.

A parked vehicle can be seen from a sufficient distance; therefore, the operator of an approaching vehicle should be prepared in case the doors of the parked vehicle are opened.

1. Did the driver look to front and rear for approaching and overtaking traffic immediately before starting to pull away from the curb?
2. Did the driver signal before pulling away from the curb?
3. Did the driver look back rather than depend only upon rearview mirrors?
4. Did the driver start into traffic only when this action would not require traffic to change its speed or direction in order to avoid his or her vehicle?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE INCIDENT WAS PREVENTABLE.

### **Skidding**

Many skidding conditions are caused by rain, freezing rain, fog, and snow, which all increase the hazard of travel. Oily road film, which builds up during a period of good weather, causes an especially treacherous condition during the first minutes of a rainfall.

Loss of traction on a grade can be anticipated, and these incidents usually are preventable. Chains or other suitable traction devices should be used, if they are available.

1. Was the driver operating at a safe speed according to weather and road conditions?
2. During inclement weather, was the driver keeping at least twice the safe following distance used for dry pavement?
3. Were all actions gradual?
4. Was the driver anticipating ice on bridges, gutters, ruts, and near the curb?
5. Was the driver alert for water, ice or snow in shaded areas, loose gravel, sand, ruts, etc.?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE

INCIDENT WAS PREVENTABLE.

### **Pedestrian and Animal Collision**

All types of pedestrian incidents, including collision with pedestrians coming from between parked cars, are usually considered preventable. There are few instances where the action of pedestrians is so unreasonable that the operator could not be expected to anticipate such an occurrence.

Collisions with animals are normally preventable, unless the movement on the part of an animal was unusual and unexpected. This is also taking into consideration the fact that the driver was aware of animals in the vicinity.

1. For animal collisions, was the animal struck by the side or rear of the vehicle?
2. For animal collision at front of vehicle, was animal running across the road at time of collision?
3. Did the driver drive through congested areas where it could reasonably be expected that pedestrians would step in front of the vehicle?
4. Was the driver prepared to stop?
5. Did the driver maintain as much clearance between his or her vehicle and parked vehicles as safety permitted?
6. Did the driver stop when other vehicles have stopped to allow pedestrians to cross?
7. Did the driver wait for the green light or stop for the caution light?
8. Was the driver aware of children and prepared to stop if one ran into the street?
9. Did the driver give all pedestrians the right-of-way?
10. Did the driver stop for a school bus which was stopped and properly signaling that passengers were loading or unloading?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE INCIDENT WAS PREVENTABLE.

### **Parked or Stopped**

Incidents occurring when vehicles are properly and legally parked are considered non-preventable. Incidents occurring while the vehicle was double parked or in a “No Parking” zone are preventable.

1. Was the vehicle parked on the proper side of the road?
2. Was it necessary to park near the intersection?
3. Did the driver have to park on the traveled part of the highway, on the curve, or on the hill?



4. When required, did the driver warn traffic with emergency warning devices?
5. Did the driver park parallel to the curb?
6. Was it necessary to park so close to an alley or directly across from a driveway?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE INCIDENT WAS PREVENTABLE.

**Non-collision Vehicle Damage, Mechanical Failure, and Miscellaneous Problems**

The incident should be considered preventable if the investigation shows a mechanical defect of which the driver was aware, a defect the driver should have found by inspecting the vehicle, or the driver caused by rough and abusive handling.

When a mechanical failure is sudden or unexpected, not resulting from abuse or ordinary wear, it may be considered non-preventable. Bad brakes should not be considered a mechanical failure unless the failure was sudden and the driver had no previous knowledge of the condition. However, this type of failure cannot excuse a driver who does not conduct a thorough pre-trip inspection of the vehicle.

It is a driver's responsibility to secure the load and to avoid sudden vehicle movements which may cause shifting of the cargo.

1. Could the driver have done anything to avoid the incident?
2. Was the driver's speed safe for conditions?
3. Did the driver obey all traffic signals?
4. Was the driver's vehicle under control?

IF THE ANSWER TO ANY QUESTION IS NO, THE DRIVER WAS NOT DRIVING DEFENSIVELY AND THE INCIDENT WAS PREVENTABLE.



**Attachment 10 – Motor Vehicle Incident Report Form**

**INSTRUCTIONS**

Immediately report the vehicle incident to the insurance administrator (Sedgwick) by calling 1-800-272-7988. Driver completes this form and submits to [MVIR@redcross.org](mailto:MVIR@redcross.org) within one business day (supervisor completes if driver is unable) For **Biomedical Services employees only**, call 1-877-UCBLOOD to report injuries related to this motor vehicle incident

**BASIC INFORMATION**

Date of Incident \_\_\_\_\_ Time of Incident: \_\_\_\_\_  AM  PM

Region / Department: \_\_\_\_\_

City/Town: \_\_\_\_\_ State: \_\_\_\_ Zip: \_\_\_\_\_ Vehicle Element #: \_\_\_\_\_

Is the vehicle DOT regulated?  Yes  No Claim # (from calling in to Sedgwick) : \_\_\_\_\_

**AMERICAN RED CROSS DRIVER INFORMATION**

Driver Name: \_\_\_\_\_ Supervisor Name: \_\_\_\_\_

Driver DOB: \_\_\_\_\_ Driver is:  Employee  Volunteer  Other: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**INCIDENT DESCRIPTION**

Please describe the incident: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please draw diagram of incident:

Driver Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## **Attachment 11 – Guide to Reporting Motor Vehicle Incidents**

**When an Auto Incident Occurs: If there are fatalities, injuries requiring more than first aid, or vehicle fluids released as a result of the collision, call 911.**

1. Turn on vehicle hazard lights.
2. If incident is minor, move vehicle to a safe place, out of traffic.
3. Gather information from other driver, passengers and witnesses.
4. Obtain and exchange insurance information.
5. Obtain information on other vehicles or property involved, get pictures when possible.
6. Cooperate with authorities.
7. Limit communications. Do not make statements to anyone other than the police officer.
8. Report incident to your supervisor.
9. Auto claims should be reported to Red Cross Claim Administrator (Sedgwick) by calling 1-800-272-7988.
10. Complete the Motor Vehicle Incident Report form.
11. Report the incident on the daily vehicle inspection form on the remarks line.

When reporting an Auto claim to Sedgwick (1-800-272-7988), Please ensure the following information is readily available.

**The following information is required to complete the phone call to Sedgwick.**

### **CALLER INFORMATION:**

1. Line of Business: (Auto Liability)
2. Date of Loss
3. Time of Loss
4. Caller Type: (Employer, Employee, Volunteer)
5. Callers Name

### **LOCATION LOOKUP:**

1. Location Code: If this code is unknown, Sedgwick can assist in determining the proper location code based on several pieces of information including: (1) the name of the Region/Chapter (2) the City/State where the Region/Chapter is located (3) zip code of Region/Chapter

### **CLIENT/LOCATION INFORMATION:**

1. Department
2. Is this the Loss Location (is this where the incident occurred?)
3. Red Cross notified date
4. Is this a National Disaster Event?
  - a. If Yes, what is the DR number

### **LOSS LOCATION INFORMATION:**

1. Loss location name (where the incident occurred)
2. Loss description (what happened)
3. Authorities involved? If 'YES' caller will be asked to provide info such as Authority name, Report filed? Report Number, Officers Name.
4. Other info: Road conditions, Weather conditions, Speed Limit, Vehicles towed)



Red Cross VEHICLE INFO:

1. Was vehicle damaged
2. Description of damage
3. Vehicle Type (Red Cross Owned/Leased, Personal Vehicle, Rental)
4. Year, Make, Model of Red Cross vehicle
5. Tag Number and State
6. Damage description

Red Cross DRIVER INFO:

1. Driver name and address
2. Is driver an employee?
3. Was driver injured (If yes, caller will be asked for an injury description)
4. Who owns the vehicle (Red Cross, Diver, Other)
5. Driver Info including: Address, phone numbers, date of birth, citations issued, wearing seatbelt, using cell phone, soc sec number.

FIRST PARTY VEHICLE OWNER (if Red Cross driver is operating a vehicle not owned/leased by Red Cross):

1. Owner Type (business or individually owned)
2. Owner Name including address and phone numbers of owner

Red Cross PASSENGER INFO: If passengers in the Red Cross vehicle, info should be provided for each passenger including:

1. Is the passenger an employee?
2. Was the passenger injured?
3. Name, address, phone numbers
4. Nature of injury (if injured)
5. If transported to hospital – name of facility

THIRD PARTY VEHICLE INFO: (info needed for each additional vehicle)

1. Year, make, model of vehicle
2. Was vehicle damaged
3. Were passengers injured (if yes, info needed on each injured party)
4. Vehicle owner info
5. Vehicle Driver info (if different from owner, is vehicle owned by business or individual)
6. Info on passengers of vehicle (how many passengers? name, contact info, injuries)

OTHER PARTY OR PROPERTY DAMAGE INFO:

1. Party type (Client, Cyclist, Pedestrian, Volunteer, Other)
2. Name/Address/Contact info of other party or property owner
3. If Property Damaged, then:
  - a) Property description (building, canopy, fence, etc)

WITNESS INFO:

1. Name, Address, Contact info for all known witnesses

CLOSING:

1. Is Red Cross contact same as the caller? Provide local Fleet Contact name and information if known.



**Attachment 12 – Motor Vehicle Record Consent**

**CONSENT for Request Motor Vehicle Record (MVR)**

The American Red Cross Fleet Management Program provides administrative and operational guidance concerning the safe operation of vehicles in service to American Red Cross.

This written program can be accessed through your supervisor, local fleet staff, or your local safety staff.

One element of our program is a periodic review of the Motor Vehicle Record (MVR) for designated job titles that include driving as a function of job performance. **Your job title is designated as one of these.** The American Red Cross will contact the Department of Motor Vehicles in the State in which you hold a drivers license and ask for a copy of your MVR.

Your acknowledgement that you are aware of the requirements of the Fleet Management Program and that you consent for the annual check of your MVR is required.

Please provide your information listed below; and then sign and date this form to document your awareness of the requirements of the Fleet Management program and your consent for the periodic check of your MVR.

Thank you for your support of a safe fleet program at the American Red Cross.

<b>Driver First Name:</b>	
<b>Driver Last Name:</b>	
<b>Driver’s License Number:</b>	
<b>Driver’s License State:</b>	
<b>Driver Date of Birth:</b>	
<b>Driver Signature:</b>	
<b>Driver Signature Date:</b>	



**Attachment 13 - Motor Vehicle Incident Review Determination form**

**Facility Name:** \_\_\_\_\_

\_\_\_\_\_  
*Meeting Date*

\_\_\_\_\_  
*Incident Date*

**Driver:** \_\_\_\_\_

**Position Title:** \_\_\_\_\_

**Incident Location:**

**Description:**

*(Mark one)*    **PREVENTABLE**     **NOT PREVENTABLE**

**Reason For Determination:**

**Committee Recommendation for Actions to be Taken:**

**Signatures:**

**Incident Review Committee or designee:**

**Supervisor:**

**Driver receives one copy. One copy must be retained by Incident Review team and one copy by driver's supervisor.**

**Date Received by Driver:**

**Driver's Signature:**

**Desire to Appeal:**

**Driver's Initials:**

**Date of Appeal:**

**Time:**

# Canal Winchester Vehicle Preventative Plan

Preventive maintenance on each 5310 vehicles is done on a regular basis. The Administrator maintains separate files on each vehicle and monitors service needs, both routine and as issues arise. Maintenance of less than \$300 is scheduled as appropriate. Maintenance and repair of more than \$300 is reported to the Director for approval and then scheduled as approved. An inspection of each vehicle is performed annually to assure that all vehicles are maintained appropriately and as required.

# City of Groveport

## Senior Transportation

### Vehicle Maintenance Plan

#### Goals and Objectives

Routine Service and maintenance is essential to ensure each vehicle in our fleet meets it's useful life. This plan outlines the schedule and process for all maintenance due for the vehicles. This plan is in accordance with the recommended manufacturers schedule and the policy schedule for the Senior Transportation Department of the City of Groveport.

#### Inventory List

2006 Ford E350 Econoline 11 passenger van  
2012 Ford E350 Econoline 9 passenger van w/ wheelchair lift  
2014 Ford E350 Econoline 9 passenger van w/ wheelchair lift  
2016 MV1 3 passenger/2 wheelchair

#### Maintenance Responsibilities

Daily maintenance checks are done by the Senior Transportation driver using the vehicle for that day. A pre-trip inspection is performed and logged. The log is turned in each day to the Transportation Coordinator. Any issues or concerns are reported verbally as well as being stated on the daily log.

The Transportation Coordinator keeps track of daily logs and organizes direction for any maintenance issues. The Transportation Coordinator makes arrangements for all scheduled maintenance and repair work with partner companies contracted to do the specific work.

The Transportation Coordinator keeps track of all maintenance and invoices.

The Transportation Director oversees all maintenance and repair activity in the department.

#### Preventative Maintenance Plan

Each day that a vehicle is in use, the driver performs a pre-trip inspection to ensure that the vehicle is in good condition for the day.

Once a week a weekly inspection is performed to ensure fluid levels and operational functions of the vehicle are in proper working order.

See Inspection form for detailed instructions.

The vehicle is marked with an accessibility symbol and the Ohio Public Transportation Logo.

Each of these elements of inspection are rated on a scale of 1-5 with 1 being poor or broken and 5 being excellent condition/like new. Space is provided on the inspection form to rate and report any concerns or issues with the vehicle.

Each month the Coordinator does a check of needed or scheduled maintenance. If service is indicated, the work is scheduled in accordance with the driver schedules to keep disruption of service to a minimum.

A roster of scheduled maintenance for each vehicle is kept updated in the Transportation office on the bulletin board and kept in electronic and paper files.

Scheduled maintenance includes monthly washes of the vehicles at a truck wash company. The drivers are in charge of cleaning the interior of their vehicles each day. Random checks of vehicle cleanliness are performed by the Coordinator. See attached form for details.

#### Follow up Procedure for Repairs

If it is determined that repair is necessary, the Coordinator will make the appointment for repairs promptly with the partner company assigned to do the specific work.

All work done on the vehicle is logged and filed in the Transportation office and kept track of by the Coordinator.

#### Consumables Re-Stocking Procedure

All consumable fluids and supplies are kept in locked cabinets in the Transportation office. The Coordinator makes sure that the supplies are stocked at all times. Fluids are dated and rotated accordingly. Drivers have access to needed supplies for the vehicles.

#### Vehicle Storage Procedure

The vehicle fleet of Groveport Senior Transportation is housed at The Groveport Recreation Center located at 7073 Groveport Rd., Groveport, Ohio 43125.

The vehicles are parked in the lot directly south of the Recreation Center building in assigned and marked spots. The lot is equipped with surveillance cameras that are monitored by City employees. The lot is also monitored by the City of Groveport Police Department. The lot is well lighted and maintained.



## MAINTENANCE

The agency maintenance is classified as:

- Routine scheduled maintenance such as oil change, brakes checks, tire rotation, radiator/transmission flush will be done to manufacture specification. The scheduled maintenance is tracked by Agency Vehicle Summary Report.
- Repairs are services that are required when the vehicle is not working properly. Major repairs are engine work, brakes, suspension, steering, ignition system, driver seat belt.
- Dealer recalls: parts replacement that the vehicle manufacturer recommends based on the age, part defect or mileage of the vehicle.
- Agency Vehicles inspection checks are completed monthly **by cargo van driver**.
- Vehicle interior inspection are conducted monthly by Transportation Manager or designated back up employee.

All maintenance will be conducted by contracted automotive service facilities. To keep the repairs at minimal cost without compromising safety standards, the following actions will be performed:

1. The Van Hurlin form is turned in by cargo van driver will be assessed by Transportation Manager or Department rep prior to putting into the shop. The maintenance shop will be call to schedule appointment.
2. Maintenance repair shops for all LifeCare vehicles is Buckeye Tire, 1000 W Mound St, Columbus, OH 43223 614-224-3166 and for accident /body shop repairs is Whiteside Auto Sales, 15921 US Route 62, Mt. Sterling, OH 43143, 1-800-686-2818.
  - a. For vehicle repairs below \$500 estimated cost will be approved by Department Directors.
  - b. For vehicle repairs above the cost of \$500 estimated cost will be forwarded to VP of Operations. There will be an estimate: dealership or repair shop. The estimate and vehicle repair history will be forwarded to Department Directors then VP of Operations. The approval for the repairs will come from the Fiscal after VP of Operations approval.
  - c. All repair cost over \$1,500 for 5 months in the same fiscal year will be considered for vehicle replacement procedures.
3. Vehicles that are still under warranty will be sent to dealership for repairs. Transportation Manager or Department rep will make a note of reminder on the Microsoft calendar for 2 months prior to warranty expiration date to have the vehicle inspected for problems.
4. All vehicle recalls will conducted by the dealership in a timely manner.
5. Windshield repairs will be completed by Safelite and fall into two categories: chip or crack.
  - a. If a windshield receives a chip or star then the repair will have the chip or star filled in. Safety requirement is to have the windshield replaced when it receives more than three chips or stars.
  - b. If the windshield receives a crack then the entire windshield will be replaced.

If a repair is needed immediately, an e-mail can be sent to alert Program Director, Controller, and VP of Operations for e-mail approval. This is only used if operations will stop because 2-3 vehicles are in need of major repairs.

## **Netcare Access**

### **Reach Out Program**

#### **Van Preventative Maintenance Plan**

8/29/2018

All vans are tracked by Fleetmatics GPS tracking software that alerts with an email to the manager, when service is to be scheduled. The following schedule is followed, based on mileage.

- 1. Oil change due** – every 4,000 miles. Also check fluids, rotate tires, check air filters and spark plugs
- 2. Check Up** – every 20,000 miles. Check front suspension, brake linings, replace cabin air filter, check tie rod ends, boot seals
- 3. Transmission fluid plus check up** – every 60,000 miles. Check (and repair/ replace if necessary) front suspension, brake linings, cabin air filter, tie rod ends, boot seals, plus CV joints, air filter, and transmission fluid.
- 4. Daily pre – trip vehicle inspections.** In addition, Netcare staff do daily pre – trip vehicle inspections for mechanical problems, and attend to any issues by having the vehicle repaired.

## **Yellow Cab Preventive Maintenance Program & Repair Shop Procedures**

Yellow Cab has a Two-Pronged Program of Preventive Maintenance, involving both our drivers and our mechanics. This system not only enhances vehicle maintenance and controls costs by identifying vehicle issues at their inception, but also elevated our safety program by making both drivers and mechanics aware of even minor changes in a particular vehicle's status.

**Driver Daily Pre-Shift Inspection-** These are the procedures that each driver follows every day before their vehicle is put into service:

- Each driver receives a pre-trip form
- Beginning mileage and start time of the manifest must be documented
- Horn is checked to make sure it is working
- Windshield is checked for any cracks and chips, and windshield wipers are checked to make sure that they are working properly
- All mirrors are checked for any cracks and chips
- Tires are checked for air pressure and proper tread wear levels
- Seat belts are checked to make sure that they are all working properly
- Wheelchair transport equipment is checked and confirmed to be operational
- Directional signals, back up siren, and hazards lights are checked
- All drivers checked to make sure that they have enough wheelchair tie downs and seat belts for the number of wheelchairs that the van holds
- Water is checked
- Oil level is checked when the van is off to make sure it is at the correct level
- Transmission level is checked when van in running to make sure it is at the proper level
- Brake fluid and windshield wiper fluid is also checked
- Each driver must have their driver license and DOT card, and the vehicle must have a gas card and Insurance card
- Once the driver has inspected their cab, the correct boxes are then checked on the pre-trip form. The form is then signed and dated.
- If the driver finds a problem with the vehicle during the inspection, he or she will then bring it to the attention of the Shop Manager. If the Shop Manager can't fix the problem at that time, the driver will be given another vehicle to inspect and use.

**Yellow Cab's Formal Preventive Maintenance Program-** This is the regular vehicle maintenance program used by Yellow's mechanics.

Yellow Cab utilizes a progressive, mileage based preventive maintenance ("PM") program that meets or exceeds the standards of the vehicle or component manufacturer and the CFP. Yellow Cab also monitors repair trends and modifies the PM requirements for that vehicle type as appropriate. In addition to the mileage-based PM program, Yellow Cab performs additional inspections (see below). Before the arrival of any new equipment or the beginning of a contract, all PM procedures are reviewed and modified as necessary. A vehicle inspection will also be performed on newly arriving equipment and a record made in the vehicle's permanent file.

Where the equipment is used, maintenance records are also reviewed; based on the vehicle and record inspection, a PM will be performed as appropriate. Vehicle mileage and PMs performed are tracked and that information then generates the PM due report. Mileages are obtained and input into the system.

When a category of PM is due, the mechanic will be issued a schedule of inspection and activities to perform. These forms vary based on the type of equipment and the interval. Again, in all instances the activities meet or exceed manufacturer, regulatory and contractual requirements. Completed PM forms are then reviewed, and the date and mileage of the PM input into the tracking system.

General A-Level PM are done at (3,000 mile) intervals by a certified mechanic that will do all preventive maintenance and minor repairs. All PM'S class B-Level (6000miles) & C-Level (24000miles) will be completed at the Yellow Cab maintenance facilities. All paper work on vehicle mileage, PM performed, and any item repaired. Fluids added will be kept on our Database with a hard copy in the vehicle file.

**Vehicle Repair and Daily Maintenance** - Yellow's standard program of repair and maintenance.

Yellow Cab is committed to providing well-maintained vehicles on this project. Our vehicles all receive preventive maintenance as well as corrective repairs in conformance with all government regulation, all contractual requirements and all standards of the vehicle/component manufacturer. Yellow Cab's maintenance facility and equipment is maintained in conformance with all regulations and contract standards.

All mechanical, electrical and hydraulic systems are maintained in proper working condition including but not limited to air conditioning and heating systems, ramps, communications equipment, lighting, and upholstery. All body damage to vehicles is repaired in a timely fashion. Vehicles are kept clean, including engine areas, as well employ part-time cleaning staff every weekend.

Vehicles that do break down are expeditiously towed with licensed tow equipment. Proper repair records are kept on breakdowns, vehicles out-of-service, and all repairs performed. Records are made available for inspection on request. Maintenance department management monitors vehicular and department performance, including repeat failures, and takes appropriate action.

Our maintenance department employees possess proper qualifications for each repair that we perform. Maintenance department employees are also properly trained and supervised, and have the proper equipment, tools, parts and supplies to perform their jobs. Whenever we subcontract for a particular maintenance function, we always closely monitor vendor performance take corrective action taken as required.