Business Case for State Vehicles and AMS Acquisitions

By submission of this form, the Agency attests to the following:

The Commissioner or Agency Head has been consulted and approves of this plan.

All inter-agency and internal exchanges, transfers and redeployments have been considered and exhausted.

All applicable systems (including FleetWave and AMS) are accurate at the time of submittal and will be updated to reflect any changes immediately upon receipt of any new acquisitions.

Available aggregate purchase opportunities have been explored.

Assets that are deemed no longer deployable, in excess of current need, or having reached the end of their usable life will be surplussed or disposed of accordingly.

All required documentation has been included for review and consideration.

_____
Agency Representative

_____
Title

_____
Date

Business Case for State Vehicles and AMS Acquisitions see instructions pages 11 & 12

For **Rolling-Stock Assets as listed in the Asset Management System (AMS) Asset Category Definitions**, skip to page 8, Part C.

PART A: OVERVIEW AND JUSTIFICATION OF STATE VEHICLE CURRENT FLEET

1. Number of Vehicles in Agency's Current Fleet

Vehicle Class	# Vehicles	Comments
Passenger Vehicles		
Small Car		
Mid-Size Car		
Large Car		
Small MPV		
Mid-Size MPV		
Full-Size MPV		
Mini Van		
Mini Pickup		
Total # Passenger		
Non-Passenger Vehicles		
Full-Size Van		
Utility Van		
Full-Size Pickup		
Other		
Total # Non-Passenger		
TOTAL ALL VEHICLES		

Glossary of Terms:

Small Car: Passenger and cargo volume is under 110 cubic feet.
Mid-Size Car: Passenger and cargo volume is 110-119 cubic feet.
Large Car: Passenger and cargo volume is 120 or more cubic feet.
Small MPV: With a length under 167 inches.
Mid-Size MPV: With a length roughly between 167-180 inches.
Full-Size MPV: With a length 181 inches or more.

Mini-Van: Having a box-like shape, side and rear windows, and typically removable rear seats for cargo.
Full-Size Van: Typically a large van, may be sold with the space behind the front seats empty for transporting of goods (cargo van), or furnished for passenger use by either the manufacturer (Wagon) or another (conversion van).
Utility Van: A camper van, for example, Winnebago.
Mini Pickup: Gross Vehicle Weight Rating is typically under or equal to 6,000 pounds.
Full-Size Pickup: Gross Vehicle Weight Rating is typically above 6,000 pounds.

2. Description of Current Fleet Rightsizing Program and Initiatives

   a. Describe the Size and Components of the Fleet

   b. Address Personally Owned Vehicle (POV) Usage Concerns or Requests

3. Analysis of Current Fleet

   a. Description of Agency Priorities/Program Need

   b. Explanation of Vehicle Utilization

   c. Evaluation of Alternate Transportation Methods

3. Analysis of Current Fleet

3. Analysis of Current Fleet

  d. Justification for Vehicles that are not in the Small Car Vehicle Class

  e. Average Age of Fleet

  f. Fleet Savings Initiatives

  g. Environmental Impact Reduction

3. Analysis of Current Fleet

  d. Justification for Vehicles that are not in the Small Car Vehicle Class

1. General Overview

   a. Description of Overall Vehicle Replacement Strategy

   b. Determination of Vehicle Redeployments

   c. Consideration of Surplus/Transfer Possibilities

1. General Overview

2. Listing of Anticipated Vehicles for Replacement

Vehicles by Class	ID/Plate	Model Year	Make & Model	Current Odometer	Miles Driven in Most Recent 12 Month Period	Avg Annual Maintenance Cost	Reason for Replacement (check all that apply)	Comments
							Age High Mileage Critical Usage Costly Maintenance	
							Age High Mileage Critical Usage Costly Maintenance	
							Age High Mileage Critical Usage Costly Maintenance	
							Age High Mileage Critical Usage Costly Maintenance	
							Age High Mileage Critical Usage Costly Maintenance	
							Age High Mileage Critical Usage Costly Maintenance	

3. Listing of Requested Vehicle Acquisitions

# Vehicles	Vehicle Class	Comments	Estimated Cost
			$
			$
			$
			$
			$
			$
			$
			$
		Total	$

If your agency requires a specific make and/or model within a vehicle class, provide additional details and justification. Please note: optional equipment on any class of vehicle must be limited to what is necessary to meet health and safety or occupational requirements.

4. Justification for Vehicle Acquisitions that are not in the Small Car Vehicle Class

1. Number of Assets in Agency's Current Fleet

Asset Type	# Assets	Description of Assets and Additional Comments
Aerial Lift		
Aircraft		
Ambulance		
ATV		
Automobile - Non Police		
Automobile - Police		
Barge		
Boat		
Bus		
Chipper		
Cleaner		
Command/Communications		
Crane		
Dozer		
Excavator		
Fire Control		
Fork Lift		
Generator		
Graders		
Hazardous Response Equipment		
Light Towers		
Loader		
Loader - Backhoe		
Motorcycle		
Snow Blower		
Snowmobile		
Specialty Response Use Vehicle		
Sweeper Pavement		
Tactical Vehicle (State Police Only)		
Tankers		
Traffic Control Devices		
Trailers		
Truck		
Unmanned Aerial Systems (Drones)		
UTV		
Van		
Total # of Assets		

2. Listing of Asset Requests & Replacements

Asset Type*	New or Replacement Asset	If Replacement, Provide License Plate, VIN or Serial #	Reason for Replacement	Estimated Cost
				$
				$
				$
				$
				$
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				$
				$
				$
				$
				$
			Total	$

* Specifications (including any upfitting) must be included for each asset requested. Please attach a detailed specification sheet for requested acquisitions.

PART D: PROPOSED PROCUREMENT APPROACH

1. Method

Will you be using an OGS aggregate buy for any purchases?   Yes   No

If not, please explain:

2. Timing

3. Funding Source   Note: specify if funding is approved or anticipated (i.e., expected federal reimbursement). Include B-1184 #, if applicable.

FOR OFFICE OF GENERAL SERVICES (OGS) FLEET MANAGEMENT USE ONLY

Comments on the Impact on State Fleet Assets and Enterprise Management (e.g. vehicles needed, proper procedures followed, etc.)

FOR DIVISION OF THE BUDGET (DOB) USE ONLY

Comments on Affordability

Instructions: Business Case for State Vehicles and AMS Acquisitions

- For all on road vehicles, this business case must be used in conjunction with the policies set forth in DOB BPRM D-750, which can be found at: http://www.budget.ny.gov/guide/bprm/d/d750.html and it is required for DOB and Executive Chamber approval.
- Address and answer all questions precisely and thoroughly.
- Upon internal agency approval, transmit to OGS at:
  OGS.sm.Fleet.Admin@ogs.ny.gov then to your DOB analysts and finally to your Deputy Secretary.

Part A: Overview and Justification of Current State Vehicle Fleet

1. Current Fleet: Agencies are required to complete the table or attach a report of vehicles in an agency's fleet. (See Glossary for Vehicle Class descriptions.) Vehicles in the fleet should be grouped by VIN decoded vehicle classes. Any additional information you feel is important to highlight about specific classes or groupings (e.g., no vehicles replaced in more than ten years, etc.), please add in the "Comments" section provided.

2. Description of Current Fleet Rightsizing Programs and Initiatives

   a. Describe the Size and Components of the Fleet: Describe any recent reductions that have been made to the fleet. Provide information about any programmatic initiatives that have been undertaken which increase or decrease the need for vehicles. Submit a list, or as much information as possible, regarding the number of cars that have been surplused or retired over the past two years. In addition, discuss relevant background information on topics such as Personnel Ratios (cars to employees) and Car Sharing / Rotating Assignment programs in place or underway.
   b. Address Personally Owned Vehicle (POV) Usage Concerns or Requests: Describe the agency's plan to comply with the POV policy. The number of employees meeting the POV threshold along with individual reimbursement costs should be included.

3. Analysis of Current Fleet

   a. Description of Agency Priorities/Program Need: Describe how the agency fleet is used to support priorities and fulfill specific programmatic needs. Detail at length what the mission critical drivers for your fleet are and how each vehicle (or vehicle type) supports the core mission of the agency.
   b. Explanation of Vehicle Utilization: Explain how vehicle utilization patterns are optimal from an agency and program perspective. Be sure to highlight vehicles that appear underutilized (e.g., geographical factors). Discuss how many cars are used exclusively for management and/or administrative use (e.g., meetings). Discuss what factors or metrics are considered when aligning fleet size to the agency's workforce and mission.
   c. Evaluation of Alternate Transportation Methods: Describe alternate transportation methods currently used, or why they are not feasible and/or cost effective. Alternate transportation methods include short-term rentals, personal mileage and public transportation.
   d. Justification for Vehicles that are not in the Small Car Vehicle Class: As required by DOB BPRM D-750, provide justification or advise what special circumstances require a vehicle in a larger vehicle class. Also explain why a small vehicle class would not be suitable. Cite examples of past conversions from larger vehicles to a smaller class and any similar initiatives currently underway.
   e. Average Age of Fleet: Provide an overview of the age of the agency fleet, citing statistics by relevant classes of vehicles. Indicate when your last vehicle purchase took place.
   f. Fleet Savings Initiatives: Describe what you have done to increase fleet savings in general (e.g., conserve fuel, lower maintenance costs, retire vehicles, reduce travel, etc.).
   g. Environmental Impact Reduction: Explain how you have reduced the environmental impact of your fleet (e.g., shift from SUVs/large cars to smaller vehicles, transition to alternative fuel vehicles, etc.). Include agency's current status as well as proposed future plan to meet ZEV or EV mandates, if applicable.

Part B: Approach to Vehicles Replacement Strategy

1. General Overview: Please describe your agency's vehicle replacement strategy, addressing both short and long-term replacement goals. Agencies should select vehicles to be replaced in accordance with established agency replacement policies. Provide a summary of relevant data your agency tracks as part of fleet management. Describe the impact of not making the recommended purchases.

   a. Description of Overall Vehicle Replacement Strategy
   b. Determination of Vehicle Redeployments: Advise why vehicles within the agency's fleet cannot be redeployed to avoid the acquisition of vehicle replacements.
   c. Consideration of Surplus/Transfer Possibilities: Demonstrate that no suitable vehicles are available to be transferred from OGS Surplus Property.

2. Listing of Anticipated Vehicles for Replacement: Complete the table or attach a report with vehicles that are prime candidates for replacement. For small to mid-sized fleets, vehicles should be listed individually. Alternatively, for fleets greater than 1,000 vehicles, you may attach a report and/or group vehicles by class, however, please note: you must still provide as much detail as possible (including the information requested in each box as applicable).   If a vehicle meets one or more of the following eligibility criteria now, or in the next six months, please indicate in the box provided:

   a. Age: 7+ years
   b. High Mileage: 125,000+ miles
   c. Critical Usage: emergency response vehicle
   d. Costly Maintenance: $1,500+ average annual maintenance excluding damage repairs or depreciation costs; vehicle is beyond repair (e.g., inoperable); repairs exceed the vehicle value

   Any additional information or special circumstances agencies feel may assist in the review of their request should be added to the "Comments" section or attached. For example, you may provide an analysis showing that the cost of repairing a vehicle is greater than its current market value. A replacement vehicle may be required for an agency to come into compliance with an environmental mandate or regulation (i.e., hybrid, flex fuel vehicles). If an agency is replacing existing vehicles with a different class that better accomplishes a program's core function or mission, this would be pertinent information to include as well.

3. Listing of Requested Vehicle Acquisitions: Complete the table or attach a report. Be as detailed and specific as possible. List any specifications that need to be added to the vehicles, as applicable, in the "Comments" section.

4. Justification for Vehicle Acquisitions that are not in the Small Car Vehicle Class: As required by DOB BPRM D-750, provide justification or advise what special circumstances require a vehicle in a larger vehicle class. Also explain why a small vehicle class would not be suitable.

Part C: Rolling-Stock Assets as listed in the Asset Management System (AMS) Asset Category Definitions

Part C is to be completed if the agency is requesting Rolling-Stock Assets as listed in the Asset Management System (AMS) Asset Category Definitions. Agencies must consult D-750 for applicable asset types, standards and emissions requirements. A listing of asset types is listed in this section for reference.

1. Number of Assets in Agency's Current Fleet: Agencies must complete the table listing their current AMS Assets by type. Any additional information that is important to highlight about specific asset types (e.g. currently out of service, asset is utilized by another agency) can be added to the 'Description of Assets and Additional Comments' section.

2. Listing of Asset Requests & Replacements: Complete the table or provide an attachment listing each individual fleet asset being requested by the agency. Please specify if the asset is new or replacing an existing asset. Assets being replaced must include the unique identifier (e.g. License Plate, VIN, or Serial Number) and a reason for replacement. All assets being purchased should include an estimated cost of purchase. Specifications for each asset, including all upfits and modifications, must be attached.

Part D: Proposed Procurement Approach

1. Method: Provide the selected procurement method, including but not limited to, Statewide or State Contract, Aggregate Buy, Agency-specific RFP/IFB, direct sale, etc.

2. Timing: Timing of the intended procurement. Please be as specific as possible.

3. Funding Source: Explain what funds are available. Note whether or not funds have already been identified in your current Budget or if the funding source is still undetermined.