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## Vehicle Fleet / Driver Management Administrative Procedure

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Responsible Official(s): Director of Parking and Transportation  
Manager Fleet Management  
Related Policies: University Procurement Policy,  
[http://finance.wfu.edu/files/reynoldacampus\\_procurement\\_policy.pdf](http://finance.wfu.edu/files/reynoldacampus_procurement_policy.pdf)  
University Fixed Asset Policy and Procedures, Fixed Asset  
Inventory Procedures, <http://finance.wfu.edu/faculty-staff/asset-management>

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### **Administrative Procedure Statement**

Wake Forest University maintains a fleet of University vehicles for the purpose of conducting University business and services to the campus community in a safe, efficient and cost-effective manner. This policy makes certain this is accomplished by ensuring vehicle operators meet University requirements and follow University procedures; vehicle repairs and preventive maintenance programs are performed as required; the vehicle acquisition process is standardized to ensure the appropriate vehicle is procured for its suitable use; and cost effectiveness is pursued in purchasing, maintenance and vehicle operation. Each department is responsible for ensuring that drivers are in compliance and guidelines are followed. This is a comprehensive policy to include all University departments.

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**Related Policies**

University Procurement Policy,

[http://finance.wfu.edu/files/reynoldacampus\\_procurement\\_policy.pdf](http://finance.wfu.edu/files/reynoldacampus_procurement_policy.pdf)

University Fixed Asset Policy and Procedures, Fixed Asset Inventory Procedures,

<http://finance.wfu.edu/faculty-staff/asset-management>

**Related Documents**

Driver’s License Checklist

Driver Performance Standards

Driver Statement and Signature

Departmental Vehicle Coordinator Designation Form

Motor Vehicle Record Release Form

Vehicle Accident Report

**Procedures**

**I. Driver Authorization**

- a. The department to which the vehicle is assigned will authorize the use of its departmental University vehicle(s). Such use will be confined strictly to faculty, staff, and students conducting official business for the University directly relating to the academic, research, and/or administrative responsibility of the department involved.
- b. Departments will ensure that only employees with valid driver’s licenses operate WFU owned and rental vehicles.

## II. Driver Qualifications

- a. All drivers must possess a valid North Carolina driver license (DL) or license from another state that is appropriate for the class/type of vehicle being operated.
- b. The driver's licenses of all employees who are assigned a University vehicle(s), or who may be expected to drive a University vehicle, must be visually verified by the department.
  - Annually, all departments must conduct/maintain a checklist (See Appendix A) indicating they have visually verified each authorized operator's driver's license for validity (i.e., DL not expired). A copy of the checklist will be forwarded to Human Resources and/or the WFU Insurance Coordinator for review and retention when requested.
  - The Director of Parking in conjunction with the Fleet Manager will conduct annual random audits of driver license checklists
  - Each driver must complete a Motor Vehicle Report (MVR) Release Form (Attachment E), which allows the University to obtain a copy of the driver's MVR to verify driving eligibility.
  - Drivers are required to report any change in driver's license status to their department the next working day.
  - If requested by a supervisor, drivers with a Commercial Driver License (CDL) must provide a certified copy of their driving history, which can be obtained from the Department of Motor Vehicles.
  - Appendix B represents the standards of driving performance required by the University. Drivers who exceed one or more of these standards may lose their privileges.
  - Employees who drive WFU vehicles must read and understand the WFU Vehicle Fleet Policy.
- c. Commercial Driver License (CDL)
  - A CDL is required of drivers who drive the following types of vehicles:
    1. Class A - Any combination of vehicle with a gross vehicle weight rating, GVWR, of 26,001 pounds, provided the GVWR of the vehicle or vehicle being towed is in excess of 10,000 pounds.
    2. Class B – Any single vehicle with a GVWR of 26,001 pounds or more, and any such vehicle towing a vehicle with a GVWR not in excess of 10,000 pounds.
    3. Class C – Any vehicle not described in Class A or B above but is, designed to transport 16 or more passengers, including the driver.

- Having a valid CDL of the proper class is a condition of employment if required for an employee's job classification and job description.
  - A driver holding a CDL is required to have a Department of Transportation approved physical examination every two years, or every one year if medical reasons require such. The employee's department pays for the first physical examination and biennial physicals going forward. If special tests are required (EKGs, X-rays, etc.), the cost of the physical examination is the employee's responsibility.
  - The employee's department reimburses him or her for any CDL amendments required for the employee's job classification, or if the job requires a CDL after employment.
  - The department employing the driver must ensure that its employees are trained on the appropriate equipment.
  - The University allows the use of a vehicle for the practical test on University time.
  - An employee is allowed to take the written test and the practical test up to two times on University time. After two failures it is the employee's responsibility to take the test on his or her personal time.
  - An employee who is unable to obtain the proper license may be reassigned or discharged, subject to availability of a position or the needs of the department.
  - The employee is responsible for keeping his or her license and physical examination updated. Failure to have a current physical examination or license may result in disciplinary action. The employee must notify his or her supervisor of any traffic violations the next working day.
  - An employee who loses the license must obtain a new license on his or her personal time.
  - Shuttle bus drivers are required to have the CDL "P" endorsement.
- d. The Director of Parking and Transportation will conduct random audits annually to ensure all documents and tracking are up to date.

### **III. University Vehicle Operation**

- a. Vehicles must be operated in accordance with all state, local and University traffic regulations.
- b. Vehicles shall not be used for the following purposes:
  - i. Business other than official University business.
  - ii. Personal convenience.
  - iii. Domicile-to-duty transportation, unless assigned a WFU commuter vehicle, which must be approved by the department's vice-president.

- iv. The transportation of any other person not essential to the accomplishment of the purpose for which the vehicle is dispatched.
- c. Vehicles should be routinely inspected for mechanical problems, leaks, exterior and interior damages, safety inspections on tires, lights, wipers, etc., and routine maintenance performed such as cleaning, fuel, oil, water, battery, etc. Under no circumstances shall an unsafe vehicle be operated. All problems should be reported to Fleet Management (336-758-4259) to initiate repair action.
- d. University faculty, staff and students are personally responsible for the prompt payment of fines for any citations received while driving a University vehicle. University funds may not be used to pay fines.
- e. Smoking is prohibited in University vehicles.
- f. Use of cell phones is discouraged while driving a University owned vehicle, unless the use of a hands-free device is used and/or the vehicle is pulled over.
- g. Texting is prohibited while driving.
- h. Vehicle Idling
  - i. It is the policy of WFU to continually improve the efficient use of vehicle fuels in an effort to reduce emissions and operating costs. To reduce overall emissions on campus and improve air quality, all vehicles on University property are prohibited from idling unnecessarily. Vehicle operators will adhere to the following standards:
    - 1. Idling is prohibited (with the limited exceptions listed below) when the ambient temperature is above 32 degrees F.
    - 2. Five (5) minute idle time limit when ambient temperature is 32 degrees and below.
    - 3. Idling is prohibited in “No Idle Zones”. Signs indicate the location of these zones.
    - 4. Vehicles will not be left idling when the operator is away from the vehicle (with the limited exceptions listed below).
    - 5. Exceptions:
      - a. Emergency response vehicles when responding to an emergency
      - b. Vehicles that must remain a specific temperature for onboard materials.
      - c. Health or safety reasons (e.g., severe weather conditions, use of vehicle safety features)
      - d. Below 0 degrees for diesel vehicles.
      - e. Traffic conditions.

- i. To encourage efficient use of vehicles and fuel, employees traveling to the same destination are encouraged to carpool when possible.

#### **IV. Student Drivers**

- a. Students must be 18 years of age or older and meet the operator driver requirements in Section III to drive a University vehicle.
- b. Students must have a faculty/staff sponsor or Advisor to operate a WFU vehicle.
- c. Student drivers must also be listed on the department's driver's license log.
- d. All students must take the Vehicle Safety class that is offered by the Police Department before driving a WFU van.

#### **V. Rental**

An employee who rents a vehicle (from a commercial agency) for Wake Forest University business purposes must meet all operator requirements of this policy. Additional insurance coverage is not required from the rental company, if the employee is traveling on University business. This only applies to North America.

Current University agreement information for car rental information is located at [www.finance.wfu.edu](http://www.finance.wfu.edu).

## VI. Accidents

If you are involved in an accident driving a University vehicle:

1. **Do not move the vehicle.** Call University Police Department if on the Wake Forest Reynolda campus.
  2. Call the local police department if you are not on the Reynolda campus.
  3. Consult the instructions in the glove compartment of all University vehicles.
  4. Notify your supervisor as soon as possible.
  5. Complete the Vehicle Accident Report Form and submit original to the Risk Management group [Manager, Risk Services – FAS (336-758-4197)], a copy to Environmental Health and Safety (336-758-5385) and a copy to Fleet Management (336-758-4259).
- a. University Police (UPD):
    - Investigates accidents involving University vehicles (within UPD jurisdiction).
  - b. Environmental Health and Safety:
    - Reviews and evaluates accidents involving University owned vehicles.
  - c. Finance and Accounting:
    - Manages all claims pertaining to accidents involving University vehicles
  - d. Fleet Management coordinates with appropriate departments, Risk Services and local repair shops to obtain estimates and vehicle repairs in a timely manner.

## VII. Vehicle Acquisition Process

- a. All vehicle acquisitions shall be approved by Fleet Management. Fleet Management will review and recommend vehicle replacements. Any acquisition in excess of \$10,000 must be reviewed and approved by the Executive Vice President, prior to any vehicle purchase. Any department requesting a vehicle replacement or increase in fleet shall submit such request in writing to the Fleet Manager, documenting the need for the vehicle, explaining why the existing vehicle is not capable of meeting the need, and verifying that no existing vehicle(s) in their fleet will serve that purpose.

- b. All vehicle acquisitions shall be approved in accordance with the University's financial approval guidelines for equipment acquisitions prior to requesting a vehicle purchase. Customer should complete an appropriate purchase requisition and submit to Procurement Services in accordance with the Wake Forest University Procurement Policy. Procurement Services will notify the Fleet Manager of the pending requisition.
- c. All vehicle purchases (motor vehicles, golf carts, utility vehicles, etc.) and specifications must be reviewed by Fleet Management to ensure that vehicles meet the guidelines of this policy and business needs of the University and customer.
- d. Fleet Management recommendations for special equipment and/or vehicle modification must be included in the final specification.
- e. Fleet Management will provide complete vehicle specifications to WFU Procurement Services, which will secure quotes, find the best value for the University, and purchase the vehicle. Procurement Services will notify Financial and Accounting Services of the acquisition for insurance and asset capitalization purposes. Fleet Management will issue a requisition for Facilities and Campus Service purchases and Procurement will issue Purchase Orders for all vehicle purchases. Procurement Services is responsible for ensuring correct coding of requisitions and purchase orders for the acquisition of capital items.
- f. The Fixed Asset Accountant will capitalize all new vehicles over \$5,000 and add them to the Fleet Management fixed asset listing. An official inventory of Fleet Management will take place once every two years. However, the Fixed Asset Accountant will contact Fleet Management quarterly to compare asset listings and make corrections as necessary.
- g. Fleet Management will inspect newly acquired vehicles to ensure they meet all appropriate specifications. All expenses related to the vehicle preparation process shall be charged to the department which will be operating the vehicle.
- h. Fleet Management will install vehicle markings. No decals, stickers, signs, or other markings are allowed on any University vehicle, other than official markings. All WFU-owned vehicles will be stenciled with the department name and include the WFU logo. Exceptions to this requirement are listed below and must be requested of the AVP for Facilities & Campus Services. Exceptions include:
  - Commuter vehicles (e.g. authorized by a cabinet officer for travel between work and home per a special work need)
  - Special use justification (e.g. undercover police vehicle)
  - Department Specific Logos



## **VIII. Fleet Size**

- a. Wake Forest University seeks to stabilize the size of the vehicle fleet, except in cases resulting from program growth or changes. When additional vehicles are necessary, the person requesting the increase will provide justification stating the need for the increase that has been approved by the appropriate department and Fleet Management.
- b. A vehicle must be turned in to Fleet Management within 7-days of receipt of a replacement vehicle.
- c. The Manager of Fleet Management will perform a random annual audit of the fleet vehicles to ensure accurate and appropriate compliance with the fleet policy requirements.

## **IX. Vehicle Disposal (<http://finance.wfu.edu/files/fixed-asset-policy.pdf>)**

- a. Disposals of vehicles will be handled by the Manager of Fleet Management.
- b. Criteria used to determine when a vehicle is replaced includes, but is not limited to, safety, age obsolescence, mileage and maintenance cost.
- c. Departments shall promptly advise Surplus when any asset (regardless of its' value) is no longer required. Surplus will make the decision on the most cost effective and beneficial disposition of the asset and complete the Fixed Asset Update Form for those assets that have been capitalized.
- d. If a vehicle is sold to an outside organization, it shall first be decommissioned by Fleet Management. All decommissioning costs are the responsibility of the operating department.
- e. Fleet Management will identify vehicles that are to be sold and will contact, at a minimum, three independent used automobile dealers to bid on the vehicles. Fleet Management will be responsible for the disposition and will receive bids and award to the highest bidder on each vehicle.
- f. Payment will only consist of certified check or money order – no cash will be accepted for payment.
- g. In accordance with the provisions outlined in the Fixed Assets administrative policy, Fleet Management may work with Procurement Services and may trade a vehicle to an automobile dealer when purchasing a vehicle from that particular automobile dealer.
- h. All proceeds from the sale of University vehicles will be recorded in the unrestricted operating fund unless the property was purchased with grant

funds (see OMB Circular A- 110 for information regarding grant assets). Vehicles purchased with auxiliary departmental funds may receive proceeds for disposed vehicles.

## **X. Passenger Vans**

- a. Due to multiple advisories and warnings issued by the National Highway Traffic Safety Administration (NHTSA) regarding the increased risk of rollover of 15 passenger vans, the University discourages the purchase or rental of 15-passenger vans. Requestors are encouraged to consider 12 passenger vans or shuttle buses and Fleet Management can assist with alternate vehicles.
- b. Any 15-passenger vans in the WFU fleet must adhere to the following:
  - Drivers must be at least 18 years of age.
  - All drivers, including Volunteer Service Corps and WFU Student Emergency Response Team must complete a driver safety course and training program geared toward van operation that is offered by the University Police Department.
  - No trailers are allowed to be towed behind a 15 passenger van.
  - Loading on top or attaching to the sides of 15 passenger vehicles can not alter the center of gravity of the vehicle. No luggage or luggage carrier can be loaded on top of a 15 passenger van.
    1. Situation that arise that require top or side loading must be inspected by senior department leadership and/or Fleet Manager
    2. No student is permitted to drive a vehicle with top or side loaded cargo
  - Back seats must be removed and this area can be loaded with cargo. However, cargo cannot exceed the height of the rear seat and must not block rearview vision.
  - Tires will be replaced regardless of tread depth if side walls are faulty due to age or otherwise deemed unsafe by Fleet Management.

## **XI. Utility Vehicles**

- a. For the purpose of this policy, all vehicles classified as a utility vehicle are non-licensed vehicles, including, but not limited to, golf carts, Kubotas, Gator (ATV) and Diahatsus. These vehicles are also classified as departmental equipment. Departments are solely responsible for following and enforcing the required procedures outlined in this policy.

- b. All acquisitions for utility vehicles will follow the same process as described in section VII, Vehicle Acquisition Process.
- c. On-campus use
  - Utility vehicles can be used on sidewalks or grass. Drivers shall be respectful of the landscape and keep from repeatedly parking or driving on the same area.

## **XII. Vehicle Maintenance / Safety Inspections**

- a. Fleet Management will schedule all vehicles requiring preventive maintenance/safety inspections. This will be done to minimize out-of-service time to the using department. Vehicles that are unsafe or in noncompliance with emissions standards remain at Fleet Management until repaired. The department is notified of the expected repairs completion date. Fleet Management does not have loaner vehicles for such occurrences, but can recommend a rental or lease company. The using department will be responsible for rentals of a replacement vehicle.
- b. All University vehicles receive preventive maintenance and safety inspection annually, at a minimum, or in accordance with the manufacture's specification. The program is administered by Fleet Management. Failure to comply with requests by Fleet Management personnel to make the vehicle available for servicing may result in notification to the responsible department head. Fleet Management may notify the responsible department director for vehicles overdue preventative maintenance inspections more than 30-days.
- c. Annually, all University vehicles are required by North Carolina to pass a safety and emissions test in order to renew license plates. Fleet Management administers this program and will make notification to the responsible department in advance to schedule this inspection. Failure to provide the vehicle for this inspection in a timely manner will result in the vehicle being unauthorized to be operated if the vehicle inspection expiration date and license plate have expired.

## **XIII. Vehicle Billing Procedures**

- a. Department vehicles are billed for materials (at cost) and hourly labor.

## **XIV. Departmental Vehicle Coordinators**

- a. All departments are responsible for establishing a vehicle coordinator in their areas of responsibility. The vehicle coordinator will be the main departmental contact for Fleet Management. The Departmental Vehicle Coordinator Designation Form (Appendix D) should be completed and forwarded to the Fleet Management Manager anytime a change of coordinator or vehicle occurs.

## **XV. Fueling/Credit Cards**

- a. All fuel purchases for WFU vehicles must be made from the WFU fueling facility located on-campus next to Fleet Management, the exceptions are:
  - A select few Facilities & Campus Services employees, as designated by the AVP, are assigned a University Procurement (PCard) Card for on-road diesel fuel and emergencies (weather, gas pump failure, etc.)
  - Fueling vehicles outside the range of the WFU fueling facility. A university purchasing card should be used in these instances.
- b. A PIN must be obtained and used to pump fuel at the WFU pumps. In order to obtain a PIN, the employee's supervisor must email the Fleet Manager with the employee's login, WFUID and department number. The employee must sign a form to obtain and acknowledge receipt of the PIN.

In order to obtain a fuel card or fuel fob, the supervisor must email the Fleet Manager and describe which WFU vehicle(s) need a gas card/fob and the budget code that the fuel is to be charged to.

Fuel is only to be pumped into WFU owned vehicles/equipment.

### **Definitions**

None

### **Contact(s)**

Jim Montgomery, Manager, Fleet Management  
montgojw@wfu.edu  
Phone 336-758-4259

### **Web Address for Policy**

<http://finance.wfu.edu/policies-and-procedures> (select Faculty & Staff, then scroll to Risk Management section)

### **Appendix and Forms**

- A. Driver's License Checklist**
- B. Driver Performance Standards**
- C. Driver Statement and Signature**
- D. Departmental Vehicle Coordinator Designation Form**
- E. Motor Vehicle Record Release Form**
- F. Vehicle Accident Report, <http://finance.wfu.edu/files/Vehicle-Accident-Form.pdf>**



Reynolda Campus Vehicle Fleet Policy

Appendix A

**WAKE FOREST UNIVERSITY  
DRIVER'S LICENSE CHECKLIST**

DATE: \_\_\_\_\_  
Department: \_\_\_\_\_  
Campus Phone: \_\_\_\_\_  
Campus Fax: \_\_\_\_\_

<b>EMPLOYEE NAME</b>	<b>√ FOR VALIDITY</b>
<i>John Doe</i>	√

**Instructions:**

- 1. All employees who drive a University vehicle or who rent a University vehicle for University business purposes must have their driver's license visually verified for validity (i.e., not expired).
- 2. Departments to do visual verification annually.
- 3. This checklist must be maintained in departmental administrative files and a copy submitted to the UNIVERSITY POLICE DEPARTMENT< HUMAN RESOURCES AND THE INSURANCE COORDINATOR as requested.

## Reynolda Campus Vehicle Fleet Policy

### Appendix B

#### **DRIVER PERFORMANCE STANDARDS**

Wake Forest University drivers may lose driving privileges if any of the following conditions apply. The individual:

1. Has a suspended, revoked, expired, or otherwise invalid driver's license.
2. Was at fault in two (2) or more accidents in the past 36 months.
3. Has acquired eight (8) points on driving record in the past 24 months.
4. Has three (3) or more convictions for moving violations within the past 36 months.
5. Has been convicted of reckless disregard for life or property within the past 48 months.
6. Has had a DWI/DUI conviction within the past 72 months.
7. Has been at fault in one (1) or more accident(s) resulting in fatality or bodily injury.
8. Has failed to report or has left the scene of an accident within the past 48 months.
9. Has operated a vehicle without insurance or without a valid license within the past 48 months.
10. Has permitted others to use vehicles without a license or without insurance within the past 60 months.
11. Has been convicted of possession of a stolen vehicle or ever used a vehicle to commit a crime within the past 48 months.
12. Has had license suspended, cancelled, or has been denied a license within the past 36 months.
13. Has had two (2) or more incidents of failure to respond to fines.
14. Has had two (2) incidents of insurance cancellations.
15. Is deemed an unsafe driver by the risk management group of Wake Forest University.



Reynolda Campus Vehicle Fleet Policy

Appendix C

**STATEMENT AND SIGNATURE**

I, \_\_\_\_\_, certify that I have read  
(PRINT NAME)

and understand, and will abide by the Reynolda Campus Vehicle Fleet Policy.

\_\_\_\_\_  
(SIGNATURE)

\_\_\_\_\_  
(DATE)

**This form is to be retained in the employee's departmental file.**

**To: Fleet Management Manager (F&CS)**



Reynolda Campus Vehicle Fleet Policy

Appendix D

**Department Vehicle Coordinator Designation**

\_\_\_\_\_, has been assigned as the Vehicle  
(PRINT NAME)

Coordinator for \_\_\_\_\_.  
Department Name

Contact Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Forward this document to the Fleet Management Manager when complete.**



**Attachment E**  
**Wake Forest University**  
**Motor Vehicle Record (MVR) Release Form**

Any driver who operates a Wake Forest University vehicle must sign a release to authorize the University to review his/her MVR. This release allows Wake Forest to periodically check the driver's MVR, which in most cases will be annually.

Check one:

Staff Member       Faculty Member       Student

Driver's Full Name:

Driver's Date of Birth:

Driver's License Number and State of Issuance\*:

*\*If licensed in the current state for less than 3 years, please provide prior license number and state of issuance.*

Driver's Email Address:

Driver's Department:

Driver's Supervisor:

I understand that in order to operate any University vehicle, my Motor Vehicle Record (MVR) will be requested by the University. This information will be used to determine my insurability, which is based on guidelines provided by WFU's auto insurance carrier. In the event that it is determined that my MVR is unacceptable, I understand that I am not allowed to operate a University vehicle until such time that my MVR meets the insurance company's requirements. I hereby authorize the University and its selected third-party vendor to access and evaluate my MVR to determine my insurability, and agree to accept the outcome of such determination. Unless this authorization is withdrawn in writing, it shall not expire or terminate unless my relationship with the University ceases.

Driver's signature: \_\_\_\_\_

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

*Please forward the completed form to Julie Groves, Financial & Accounting Services*