



**Office of Fleet Management**  
**Fleet Manager Certification Committee**

# Table of Contents

Letter From the Committee .....	3
Ohio Revised Code and the Committee's Charter .....	4
Other State's Fleet Management Certification Requirements .....	4
Description of Ohio's Fleet Managers .....	4
Desirable program characteristics .....	4
Desirable Curriculum Characteristics .....	5
Program Evaluation.....	6
NAFA .....	6
NCSFA .....	7
Committee Recommendations .....	9
Recommended Curriculum .....	9
Who should be required.....	11
Levels of certification .....	11
Required time frame to complete certification.....	12
Funding Availability .....	12
Implementation Recommendations .....	12
Attachment A – Committee Charter .....	14
Attachment B – Survey of other states.....	15
Attachment C – Fleet size by agency .....	16

## Letter From the Committee

Dear Office of Fleet Management,

Attached is our final report with our recommendations for instituting, developing and maintaining a certified fleet management program.

We believe that these recommendations, if followed, will thrust the state of Ohio's fleet management practices into being a model for other states to follow.

We appreciate the Vehicle Management Commission for acknowledging the necessity of better qualified and trained fleet managers. We feel implementation costs will be offset by the savings to the State.

The committee members wish to thank the Office of Fleet Management and the Vehicle Management Commission for the opportunity to research and make these recommendations.

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Leilani Napier

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Mark Gnatowski

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Barbara Sherman

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Jeff Smith

## **Ohio Revised Code and the Committee's Charter**

Ohio Revised Code Section (ORC) 125.832(I)(1) requires the Department of Administrative Services' Office of Fleet Management (OFM) to develop and maintain a certified fleet manager program. A committee comprised of Janet Stackpole (Chairwoman & OFM representative), Mark Gnatowski (ODOT Administrator of Equipment Management), Jeff Smith (ODMRDD Fleet Manager) & Barbara Sherman (ODH, Chief, Administrative Operations), developed a Charter (Attachment A) to accomplish this goal.

The committee was active in February through June 2005 and arrived at its recommendations based on statewide considerations to be commensurate with the needs of the ORC.

## **Other State's Fleet Management Certification Requirements**

The committee surveyed other states (Attachment B) using resources of the National Conference of State Fleet Administrators (NCSFA, of which Janet Stackpole and Mark Gnatowski are members). Of the 24 respondents, only Wyoming has legislation requiring fleet manager certification. The Wyoming respondent indicated no one has a fleet certification and there are no plans to become certified. Only the fleet manager for North Dakota has obtained fleet management certification, though not required by the state.

## **Description of Ohio's Fleet Managers**

Currently, there is no consistent classification for fleet managers. Fleet managers are in varying positions, both bargaining unit and exempt classifications. Within the agencies, these classifications range from an inventory control specialists to managers of fiscal departments. Most of these employees have multiple responsibilities in addition to fleet.

## **Desirable program characteristics**

The committee identified the following characteristics that a fleet management program should consist of:

1. Flexibility – The program should allow individuals ample time to complete along with a curriculum that covers Ohio's needs.

2. Pricing – The initial cost of the program should be affordable. Any ongoing costs should be minimal.
3. Credibility – The program should be credible and recognized by all national fleets.
4. Private/Government balance – The program should cover major aspects of private and government fleet requirements.
5. Continuing education - The program should have ongoing education that allows the individual to stay certified and updated on new fleet management procedures.

### **Desirable Curriculum Characteristics**

State of Ohio Agencies' fleets are comprised of everything from snowplow trucks to sedans. Based upon this diverse fleet, we arrived at the following core curriculum:

1. Break even analysis - Empower fleet managers to make prudent fiscal decisions based on usage, salvage value, age, miles, hours, etc.
2. Total cost management - Consider all cost components (fuel, maintenance parts and labor), depreciation, and overhead. Calculate performance measures (e.g., cost per mile) for decisions in regarding vehicle life cycles.
3. Usage profiles - Knowledge of how to develop usage profiles for pool users, assigned vehicles, institutional usage patterns, etc.,
4. Motor pool management - Enable fleet managers to make logistical decisions regarding physical placement of pool, usage patterns, and proper pool size.
5. Technology – Knowledge of GPS and other devices to manage trips and control costs.
6. Fuel management – Usage of retail or state agency fuel stations along with a uniform reporting system.
7. Maintenance management- Obtaining the proper service and repairs using state facilities or State of Ohio contract vendors to maintain warranties.

## Program Evaluation

The committee began by evaluating two basic options: Create an “in-house” curriculum to be developed and maintained by the OFM; or seek a vendor with an existing education program. Through extensive debate the committee agreed to pursue an existing program for the following reasons:

1. Developing and maintaining a curriculum would be a significant time and staff investment for OFM.
2. While a custom, “in-house” program would provide customized education, it would have limited credibility among peers.
3. Keeping the curriculum current with industry trends would be problematic.

With this in mind, the committee conducted an industry review to identify existing certification programs. Two such programs were clearly the front runners in this field, the National Conference of State Fleet Administrators (NCSFA) and the National Association of Fleet Administrators (NAFA). Both programs have national recognition among the fleet industry. Analysis of each consisted of reviewing program materials and interviewing representatives. The following is a summary of both certification programs.

### **NAFA**

NAFA is a non-profit professional association founded in 1957 and has a membership of approximately 3,500 members and affiliates, over half of which are from governmental entities.

NAFA sponsors the Certified Automotive Fleet Manager (CAFM) program. This is a self study curriculum developed by individuals working in the fleet management industry. Per conversations with a NAFA representative, this program is designed to foster a high level fleet management skill set that can be applied to a variety of industries (Private / Public Sectors, Utilities, etc.).

The course of study is updated every three years to keep current with industry trends; an updated curriculum, due for release August 2005, is comprised of seven modules presented in text based format. They address fundamentals in the following areas:

1. Asset management

2. Fuel management
3. Risk management
4. Maintenance management
5. Finance management
6. Business management
7. IT management.

Each module has a corresponding test that is proctored locally at various universities and colleges four or five times per year. Multiple module tests may be taken at once. It is required to have two years experience as fleet manager or experience under a fleet manager. NAFA indicated that this requirement is somewhat flexible, but individuals must have one year experience. The current program requires a time commitment of approximately one to two years. The updated program, to be released in August, will allow for more time flexibility; it could be done in a few months. Once certified, there is a continuing education requirement every five years. These credits are not limited to NAFA seminar offerings. The full cost of this program is \$3,250.00. There are bulk discounts available for the certification program.

### **NCSFA**

NCSFA, established in 1987, offers the Fleet Certification Program (CFM) through a cooperative venture with Kelly Walker Associates. Kelly Walker offers three levels of fleet certification; the second and third level building upon previous certifications. There are no continuing education requirements; however, the certification must be renewed every five years. The three levels are as follows:

1. Professional Fleet Managers Certification – This certification consists of a self study program and an open book test. It is designed for individuals relatively new to fleet management or those with internal shop management responsibilities.
2. Advanced Professional Fleet Managers Certification – This level requires successful completion of the previous certification plus a 16 hour in class seminar and an open book test. This level is geared toward persons with at least three years experience in fleet management.
3. Master's Professional Fleet Managers Certification – This level consists of completion of the Advanced Professional Fleet Manager Certification plus further

self study in the area fleet principles and concepts. In addition, the student must complete an open book test and write a professional paper. Students must have at least five years experience in fleet management.

This program was developed for fleet organizations with internal maintenance and fuel infrastructures, as well as vehicles with auxiliary equipment. While the curriculum would include general fleet management topics, this program is not oriented toward “vanilla fleets”; this is the term Mr. Walker used to describe fleet organizations with passenger and light duty vehicles, and who primarily utilize commercial vendors for fuel and maintenance. The Advanced Professional Fleet Managers Certification was recommended for Ohio’s fleet managers. This would require customizing the curriculum to better address management topics for those agencies with “vanilla fleets”. The initial cost of this program is \$1,750.00; this does not include on site training and customization expenditures. Bulk discounts may be negotiated. The following chart summarizes key aspects of each program:

	<b>Kelly Walker (NCSFA) - Based on Advanced Certification Level</b>	<b>CAFM (NAFA)</b>
<b>Prerequisites</b>	<ul style="list-style-type: none"> <li>▪ Experience: 3 plus years experience in a leadership position in fleet or shop operations.</li> <li>▪ Education: High School or GED.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Experience: 2 years experience as a fleet manager or working under a fleet manager. This could be reduced to 1 year.</li> </ul>
<b>Format</b>	<ul style="list-style-type: none"> <li>▪ Self study, open book testing and in class seminar.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Self study and closed book testing for each module. Testing is proctored at local educational institutions.</li> </ul>
<b>Curriculum</b>	<ul style="list-style-type: none"> <li>▪ Focus on large organizations with self contained infrastructures.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Focus on high level management skills that can be applied to a variety of settings.</li> </ul>
<b>Certification Renewal</b>	<ul style="list-style-type: none"> <li>▪ Every 5 years. No continuing education required.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Every 5 years. 80 hours of continuing education.</li> </ul>

## Committee Recommendations

### **Recommended Curriculum**

To identify the certification most closely aligned with the desired characteristics discussed above, both programs were evaluated according to these aspects. The following chart summarizes this comparison.

Desired criteria	Kelly Walker (NCSFA) - Based on Advanced Certification Level	CAFM (NAFA)
Flexibility - Time	<ul style="list-style-type: none"> <li>Self Paced, but must complete in 18 months from purchase.</li> </ul>	<ul style="list-style-type: none"> <li>Self Paced - Text Material.</li> </ul>
Flexibility - Curriculum	<ul style="list-style-type: none"> <li>Oriented toward large operations with self contained infrastructures.</li> <li>Ability to customize for passenger and light duty fleets at additional cost.</li> </ul>	<ul style="list-style-type: none"> <li>7 module areas - No flexibility.</li> </ul>
Pricing - Initial	<ul style="list-style-type: none"> <li>Bulk discounts negotiated.</li> <li>Approx \$1,750 (This does not include cost of on-site training or curriculum customization at \$100 / hour).</li> </ul>	<ul style="list-style-type: none"> <li>Bulk discounts available based upon enrollment numbers.</li> <li>\$3,250 at non-member rate without bulk discount.</li> </ul>
Pricing - Ongoing	<ul style="list-style-type: none"> <li>Renewal - \$200 / 5 years.</li> </ul>	<ul style="list-style-type: none"> <li>Continuing education costs - variable.</li> <li>\$25 Renewal Fee</li> </ul>
Credibility	<ul style="list-style-type: none"> <li>Sponsored by a national fleet organization.</li> </ul>	<ul style="list-style-type: none"> <li>Sponsored by a national fleet organization.</li> </ul>
Private / Government Focus	<ul style="list-style-type: none"> <li>Curriculum designed to address various industry settings.</li> </ul>	<ul style="list-style-type: none"> <li>Curriculum geared toward high level fundamental skills that are Independent of organizational setting.</li> </ul>
Continuing Education	<ul style="list-style-type: none"> <li>No requirement.</li> </ul>	<ul style="list-style-type: none"> <li>Required - 80 credit hours every 5 years.</li> </ul>

In addition, the committee compared each program to the identified curriculum topics earlier identified. These characteristics are again listed with the comments regarding each certification program.

Desired curriculum topics	Kelly Walker (NCSFA) - Based on Advanced Certification Level	CAFM (NAFA)
Total cost management	<ul style="list-style-type: none"> <li>▪ Included in Advanced level certification</li> </ul>	<ul style="list-style-type: none"> <li>▪ Asset management module</li> <li>▪ Finance management module</li> <li>▪ Business management module</li> <li>▪ Risk management module</li> </ul>
Motor pool management	<ul style="list-style-type: none"> <li>▪ Included in Advanced level certification</li> </ul>	<ul style="list-style-type: none"> <li>▪ No specific module</li> </ul>
Fuel management	<ul style="list-style-type: none"> <li>▪ Internal fuel management covered in Advanced level.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fuel management module</li> </ul>
Maintenance management (shop and commercial)	<ul style="list-style-type: none"> <li>▪ Shop management covered. Commercial topics would be customized.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Maintenance management module</li> </ul>
Technology	<ul style="list-style-type: none"> <li>▪ No specific topic area</li> </ul>	<ul style="list-style-type: none"> <li>▪ IT management module</li> </ul>
Developing usage profiles	<ul style="list-style-type: none"> <li>▪ No specific topic area</li> </ul>	<ul style="list-style-type: none"> <li>▪ No specific module</li> </ul>

Both certification programs appear to offer well developed curriculums, making the committee's recommendation a difficult endeavor; each with strengths in different areas.

The members choose the CAFM program for the following reasons:

- CAFM offers a well rounded knowledge base that will be useful in a variety of fleet operations. NCSFA's curriculum targets large operations with internal structures.
- The CAFM program is a known price. The NCSFA program would require customization to include topics for smaller fleets. The final cost of this customization is unknown.
- CAFM also requires continuing education credits to ensure managers remain up to date on industry trends. It is recommended that OFM play a part in assisting fleet managers in completing the necessary continuing education credits. This will allow OFM to cover state specific topics as well as provide a

cost efficient method for achieving these credits. The user group forum would be an appropriate venue for these seminars.

### ***Who should be required***

With the program recommendation completed, the committee turned its attention to answering the remaining issues contained in the committee's charter: Who should be required to obtain certification? Should there be multiple levels of certification? What time frame is reasonable to accomplish the required certification?

Currently, there are 42 agencies, boards and commissions with owned vehicles. Four agencies have at least 500 vehicles, 10 agencies have between 500 and 100 vehicles, and 28 have below 100 vehicles. These 28 state agencies own and operate 435 vehicles or 3.7% of the entire state vehicle inventory. See attachment C for complete fleet size listing. Maintaining a certified fleet manager is an investment of time and money. With this in mind, the committee makes the following recommendation. Only the fourteen agencies with 100 or more vehicles should invest in certifying a fleet manager. Agencies with less than 100 vehicles should be centrally managed, leased and administered, by DAS. Ohio Revised Code 125.832(F)(1) directs centralized management of these fleets and fleet consolidation was a primary recommendation made by an outside fleet management consultant. The costs of certification and continuing education would not result in an appreciable return of investment for these agencies, not to mention the savings in the amount of time the affected state agencies would expend to manage the vehicles. In addition, from an efficiency standpoint, centralized management is a logical progression. It is expected that this may not be agreeable to some affected agencies, but the committee believes this is the best overall recommendation for the state.

### ***Levels of certification***

Ideally, multiple levels of certification would be available. Lower levels of education would be more cost effective for agencies with smaller fleets. Unfortunately, lower levels of certification are oriented toward automotive shop certification. This is true of NCSFA's certification. The base certification level of the three tier certification is meant for shop

managers. NAFA offers well rounded skill development, but does not offer lower level certifications. Periodic reviews of industry offerings are suggested.

### ***Required time frame to complete certification***

Obtaining a fleet certification will require time to accomplish. NAFA recommends students have two years experience either as a fleet manager, or working under a fleet manager. NAFA is somewhat flexible, but students must have at least one year experience. While some fleet managers will meet this requirement others will need to establish this experience. The committee suggests building this time into the time frame window. The committee suggests allowing two years to complete the certification. This will allow for employees to gain the needed experience and time to incorporate the studies and exams into the existing workload.

### **Funding Availability**

Maintaining a certified fleet manager will be a financial outlay for agencies, both initial and ongoing costs. The committee asked DAS Human Resources to conduct a review of potential funding assistance. While there are no guaranteed sources of financial assistance, there may be funds available through Workforce Development and the Exempt Professional Development Fund, provided the affected employee freely offers to utilize these programs. Caution must be used by agencies to ensure that these Workforce funds are offered by the employee without perceived coercion. These monies would be available to both exempt and bargaining unit employees.

### **Implementation Recommendations**

In addition to the above recommendations, the committee has the following suggestions for implementation.

1. State specific training should be provided by OFM. CAFM will provide a well rounded knowledge base. This certification cannot be expected to provide state specific training. Fleet policies and procedures, data collection and reporting requirements can be taught in a variety of methods e.g. user group meetings, training manuals etc.

2. OFM should provide information regarding on-going training opportunities to fleet managers. Obtaining quality continuing education could be problematic. CAFM requires 80 credits every 5 years. OFM will have an opportunity to take a lead in this area. Local seminars and learning opportunities should be continually investigated and announced to the state's fleet management community. When feasible, OFM should utilize the user group forum to conduct events that will count toward the credit requirement.
3. Develop a fleet classification series. As described above, fleet managers have a wide variety of job classifications. As a result, these employees have varying levels of authority to make good financial decisions. The alternative is to certify those who do have such authority. The risk to this approach is that they are more likely to be further removed from the day to day operations. It is hoped that creating a fleet classification series will be a viable solution to this potential problem. The committee does realize this is a complex undertaking and will require cooperation from state agencies.

## Attachment A

### **FLEET MANAGER CERTIFICATION COMMITTEE CHARTER**

The Fleet Manager Certification Committee is established to provide the Department of Administrative Services' Office of Fleet Management (OFM) with recommendations on how to develop and maintain a certified fleet manager program as required by Ohio Revised Code Section 125.832(I)(1). The Committee shall submit its report to the OFM no later than one hundred and twenty days after its first meeting. The Committee shall have four active members to be selected by the OFM of which at least one member shall be an employee of the OFM. The OFM member shall act as the chairperson. The OFM shall provide administrative and legal support to the Committee.

## Attachment B

### FLEET MANAGER CERTIFICATION SURVEY

Agency	Name	Certified Fleet Manager Now?	Certification Req'd by Law?	Plans to become Certified?
Univ. Illinois	Mike Hari	No	No	No
North Dakota DOT	Paul R. Feyereisen	Yes – Kelly Walker PCFM	No	
Idaho, DOT	Steve Spoor	No	No	Yes
Georgia, DAS	Mike Merget	No	No	No
Colorado DOT	Scott Madsen	No	No	No
Utah DOT	Steve Saltzgiver	No	No	No
NY DOT	Steve Weir	No	No	Yes
MO Dept Conservation	Jim Gerling	No	No	No
WA Motor Pool	Bryan Bazard	No	No	No
MO Dept. Natural Resources	Stan Perkins	No	No	No
Arizona Dept. of Admin.	Randy Frost	No	No	No
OK Dept. of Central Svcs.	David Murdock	No	No	No
Iowa DOT	Carol Coates	No	No	No
OK Dept. Edu	Jimmy Ramsey	No	No	No
OK Fleet Svcs	Pamela Scott	No	No	No
MN Travel Admin.	Tim Morse	No	No	No
Univ. California	Larry Charlton	No	No	No
IL CMS Division	Barb Bonansinga	No	No	No
TN General Svcs Div.	Bill Malcolm	No	No	No
Vermont DOT	Ken Valentine	No	No	No
Fleet Mgmt, NCSFA	Joe O'Neil	No	No	No
WY State Motor Pool	Annette Spitsbergen	No	Yes	No
KS Univ.	Peggy Grater	No	No	No
NY State	Ron Ottman	No	No	No
WI DOT	Rick Moling	No	No	No

## Attachment C

### AGENCY FLEET SIZES As of 2/24/05

Agency	Number of Vehicles	Agency	Number of Vehicles
Department Of Transportation	4390	Veterans' Home	22
Public Safety	1816	Cosmetology Board	14
Natural Resources	1529	Education	14
Rehabilitation & Correction	1049	School For The Blind	12
Bureau Of Workers Compensation	357	School For The Deaf	11
Mental Retardation	298	Health	10
Commerce	287	Job & Family Services	9
Environmental Protection Agency	274	Consumers Counsel	7
Ohio Turnpike Commission	270	Insurance	6
Agriculture	259	Library	6
Mental Health	188	Alcohol & Drug Addiction Services	5
Youth Services	174	Employment Relations Board	5
Lottery	161	Aging	4
Administrative Services	153	Ethics Commission	4
Public Utilities Commission	75	Racing Commission	3
Expositions	47	Southern Ohio Agricultural	3
Rehabilitation Services Commission	41	Civil Rights	2
Taxation	41	Budget & Management	1
Development	33	Inspector General	1
Adjutant General	32	School Facilities Commission	1
Industrial Commission	25	Water Development Authority	1