

Fall 2011 Grant Management Training



Preventive Maintenance



Preventive Maintenance Overview

- Asset Management Responsibilities
- Vehicle Storage, Safety and Security
- What's in a Preventive Maintenance Plan?
- Eligible Preventive Maintenance Grant Expenses
- What's in a Vehicle Maintenance Schedule?
- 2011 Vehicle Preventive Maintenance Pilot Desk Review
- Resources

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Asset Management Responsibilities

- The focus today is on the fleet. These principles apply to all capital assets, such as passenger shelters, facilities and equipment
- Ensure your vehicle fleet is in a state of good repair, as required by FTA and ODOT
- Have enough vehicles to meet service demands
- Ensure vehicles are safe, clean, serviced regularly

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Asset Management Responsibilities

- Written agency asset management policies; including vehicle maintenance
- Preventive Maintenance Plan
- A maintenance schedule for each fleet vehicle: based on manufacturer's recommendations and warranty requirements, including ADA equipment
- Document inspections, including daily driver inspections and mechanic's follow-up
- Conduct and document annual vehicle safety inspections

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Asset Management Responsibilities

- A plan, budget, and procedures for handling unexpected repairs
- A regular interior/exterior vehicle cleaning program
- Policies and facilities for secure vehicle storage
- A system (automated or manual) for scheduling and tracking vehicle maintenance activities
- Keep good records of all vehicle service and repairs, including work orders, invoices, and receipts

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Vehicle Storage, Safety, and Security

- Secure parking area with fencing, adequate lighting, alarm system is best practice
- May request local police patrols, or use a private security service
- Limit access to vehicles, such as a key control system
- Monitor off-site parking locations

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What's in a Vehicle PM Plan?

- A Vehicle Preventive Maintenance Plan is required by FTA and should include:
- Links to agency maintenance policies
- An annual asset inventory
- Document staff maintenance responsibilities

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What's in a Vehicle PM Plan?

- Maintenance schedules for each vehicle must meet or exceed manufacturer's recommendations
- Be sure to include vehicle warranty services
- Include lift service
- Routine service should include interior cleaning, exterior washing
- Daily driver's pre- and post-trip inspections
- Document mechanic's follow-up on reported problems

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What's in a Vehicle PM Plan?

- Preventive Maintenance Plans must be submitted with preventive maintenance grant applications for federal programs
- Agencies are required to conduct annual inventory and report in quarterly reports to ODOT PTD on all capital assets—as long as they remain in service
- PM records, including maintenance schedules, must be kept for as long as the vehicle remains in service plus three years

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Eligible Preventive Maintenance Expenses

- Vehicle preventive maintenance includes:
 - Oil, lubrication, brake and steering fluids, hydraulic fluids
 - Tire rotation & replacement, and battery servicing
 - Engine tune-ups and regular replacement of filters, spark plugs, and belts
 - Vehicle interior and exterior washing
 - Scheduled or routine mechanical maintenance (includes wheelchair lift and other installed equipment)
 - PM may also include a single major component rehabilitation or rebuild which should be done in the first year of a grant

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Eligible Preventive Maintenance Expenses

- Vehicle preventive maintenance also includes:
 - Wear and tear repairs (not accident caused), including seats, flooring, exterior paint, etc.
 - Parts, supplies, and labor as installed per vehicle at the time maintenance is performed
 - Required annual vehicle safety inspections by a certified mechanic

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Capitalized PM Grants: What's Not Allowed?

- Not allowed in capitalized PM grants:
 - Vehicle warranty-covered repair work
 - Accident repairs
 - Bulk purchase of oil, fuel, and spare parts
 - Expenses covered under other funding sources
- How do I pay for such work?
 - Contact the vendor or insurance agent for warranty work
 - Use other agency funds (operations grants or contingency funds) to pay for accident repairs and bulk purchases

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Vehicle PM Schedule - What's in it?

- Each vehicle purchased with federal grant funds must have its own individual maintenance schedule
- The schedule should include all tasks required to keep vehicle in a state of good repair and warranty eligible
- The vehicle maintenance schedule must **at a minimum** include all service tasks for that vehicle as recommended by the manufacturer
- You may add service that exceeds the manufacturer's recommendations

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Vehicle PM Schedule - What's in it?

- See forms and examples for reference:
- Include vehicle manufacturer, make, model, year, capacity, category (for example E-2), VIN, license plate number, and agency inventory tag number
- Include all components under warranty: engine; chassis; tires; batteries; ADA equipment
- Record service intervals by trigger for service: e.g., date, mileage, lift cycles
- Allow for mechanic's initials or ID number to verify service was performed and/or who did it

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Vehicle PM Schedule - What's in it?

- Record service by completion date; mileage at time of service; and when next service is due
- Include replacing tires, batteries, and any routine services
- Log unexpected repairs or parts replacements, including dates vehicle is out-of-service
- When local shop is used, the schedule should note company name, and dates sent out and returned to service

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Vehicle PM Schedule - What's in it?

- Include the required annual safety inspections
- Cleaning does NOT have to be included in the maintenance schedule, but have a vehicle cleaning policy, and follow it
- Include back-up vehicles

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2011 Vehicle Preventive Maintenance Pilot Desk Review Findings

- Most agencies used a schedule that did not show the manufacturer's required tasks for good condition
- Documentation and record-keeping varied widely in quality
- Many service tasks weren't documented
- Safety tasks (annual safety inspections, tires and battery replacements) weren't listed
- Lift maintenance was not performed per manufacturer's warranty requirements and was poorly documented

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Vehicle Preventive Maintenance Resources

The Transit Provider Handbook, Vehicle Preventive Maintenance Section, on PTD's web site at oregon.gov/odot/pt includes samples and documents on:

- Fleet management
- Maintenance Plans
- PM checklists, schedules and forms
- New driver orientation and pre- and post-trip inspection forms
- Annual safety inspection checklist
- ADA/wheelchair lift policy and procedures

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Public Transit Division

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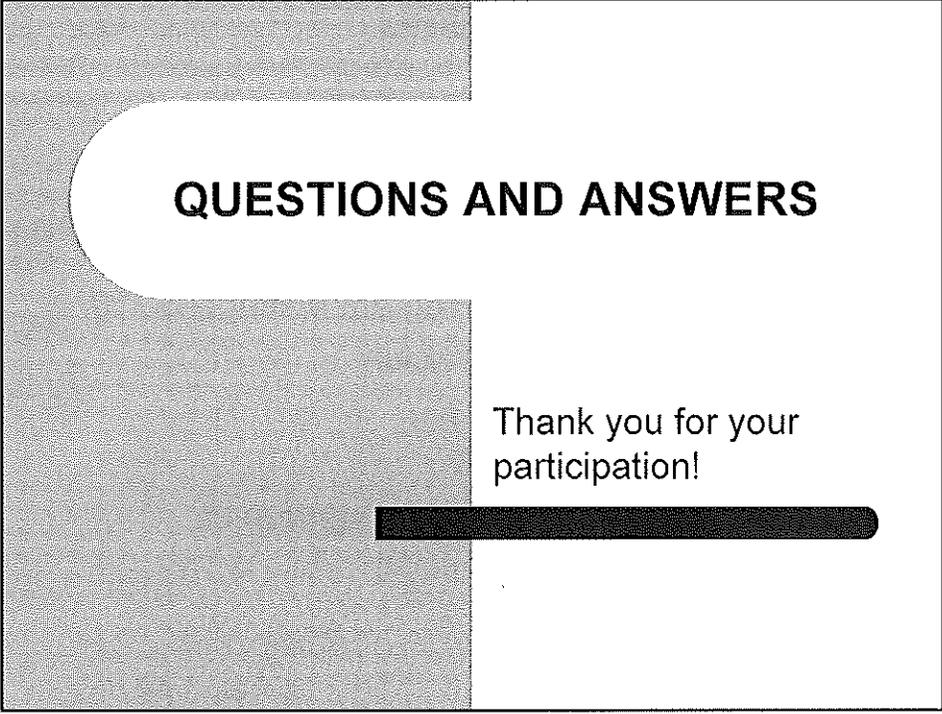
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QUESTIONS AND ANSWERS

Thank you for your
participation!

