



## **Idaho Transportation Department Public Transportation**

### **Comprehensive Management of FTA Funded Capital Assets**

- **Vehicle**
- **Asset with a minimum useful life of one (1) year**
- **Facility**

## Introduction

ITD-PT/Office of the Idaho Transportation Department is committed to continued control and ensuring to the fullest extent that a fleet of safe and reliable vehicles for all of Idaho's transit customers is maintained. The policies and procedures outlined in this manual will ensure all assigned vehicles are kept in top operating condition by following an in-depth preventative maintenance schedule. Please keep in mind that this brochure is not all-inclusive.

- **FTA requires that every Applicant and/or Subrecipient applying for any capital grant funds develops a comprehensive preventive maintenance program that will cover vehicles, major equipment, and facilities.**

Applicant and/or Subrecipient program must include:

- Performing regular scheduled maintenance procedures in order to minimize malfunctions, rather than simply making repairs when something goes wrong.
  - How you will perform necessary repairs promptly to prevent further damage and maintain vehicle safety.
  - When new vehicles are received from the manufacturer please review the manufacturer's preventive maintenance schedule and incorporate it into your overall maintenance plan.
- The ITD-PT Office will be conducting periodic visits to each subrecipient to ensure a comprehensive preventive maintenance program is in place.

A successful PM program consists of a number of elements. The following are a list of most capital assets to consider when developing your program:

Capital assets are tangible items with a purchase price of \$5,000 or more, and a useful life of at least one year. Capital assets include the following examples:

- Rolling Stock (all vehicles used for passenger transport)
- Vehicles that are **not** used for passenger transportation, such as maintenance and staff vehicles
- Shop Equipment (fixed or mobile vehicle maintenance equipment)
- Office Equipment (including office computer servers, personal computers (PCs), copiers, and other large office equipment)
- Communications Equipment (includes telephone systems, and radio systems when the purchase is \$5,000 or more)
- Security/Surveillance Equipment (includes security systems such as lighting, cameras and recording equipment – for installation at a facility or in vehicles)
- Passenger Shelters and Signage
- Buildings and Facilities (such as bus barns, maintenance shops, or transit centers)

## Essential Elements of a Successful Vehicle Preventive Maintenance Program

ITD-PT recognizes the diversity of public transportation providers across the state, and that a “one size fits all” approach to asset management plans is not practical. A successful PM program consists of a number of different elements. The following elements should be considered when developing your program.

### Routine Servicing and Maintenance

Routine servicing and maintenance is the heart of any PM program. Every vehicle has its own maintenance requirements and recommended program by the manufacturer. In many cases, it will be desirable to exceed the recommendations, depending on factors such as weather, terrain, service type, and annual mileage. Maintenance intervals should never exceed those recommended by the manufacturer. Table A and B lists items to be considered in developing a PM schedule for the expected life of the vehicle.

In establishing your service program, consider the following suggestions:

- Make all service intervals mileage multiples of some common denominator. For example, if the oil change interval is 3,000 miles, consider performing tire rotations every 6,000 miles and transmission fluid services every 24,000 miles. Consistent service intervals increase the efficient use of labor and minimize the number of times the vehicle is in the shop.
- Consider seasonal variations that may alter service intervals. For example, harsh winters may dictate shorter oil change intervals due to cold starts/running and earlier replacement of air filters when operating over salted or sanded roads. Also, plan seasonal fleet-wide service checks, such as a spring campaign to prepare air-conditioning systems for the summer, and a fall campaign to prepare for adequate winter heating and defrosting.
- Consider local conditions when planning your maintenance program. For example, services operated over unpaved, dusty roads may require more frequent oil changes and shock absorber replacement. Constant slow or stop-and-go driving and low annual mileage are other examples of situations where service intervals for some items should be shortened.
- Have a regular program for washing and cleaning the vehicles. Accumulated salt will greatly accelerate rusting and, where chloride compounds are used to control dust on unpaved roads, corrosion can occur even in summer.

### Inspections

Inspections are a key element in the early detection and remedy of potential failures. Both drivers and mechanics should perform them, to varying degrees. Investing a short time on a daily basis to inspect each vehicle will help detect problems, thereby improving safety, decreasing vehicle repair costs and vehicle downtime.

Drivers should perform a regular pre-trip inspection of the vehicle (**Table B**, in addition to inspecting the vehicle when it is cleaned and refueled. Both mechanics and drivers should inspect the vehicle through observations and checks during routine servicing procedures (it is quite possible to perform a complete vehicle inspection while the oil is being drained). **Table C** lists items that should be included in the mechanic's inspection at a service interval.

### Replacement versus Repair

"If it ain't broke, don't fix it!" is a time-honored cliché and if we could always predict the exact point of any component failure, it would be a reasonable way to operate. However, without such predictability, it makes sense to replace or rebuild certain components prior to failure (whenever there is the data to justify doing so without incurring extraordinary costs).

While this routine replacement concept can be applied to a wide variety of components, it does require that you gain experience with your particular vehicles in your unique environment. If you have no prior experience with your new vehicle, we recommend contacting other operators using the same vehicle, under similar circumstances, with good maintenance records to assist in developing a routine component replacement schedule.

Routine replacement is typically applied to those components where little if any diagnostic aid is available, other than visual inspection. These include items such as:

- fluids (except windshield washer and refrigerant)
- hoses
- belts
- wiper blades

### Warranties

Your vehicle will come with a number of warranties from the chassis supplier, body builder, and major component suppliers. These take many forms but generally include some combination of mileage and time, and will often contain exclusions for "consumable" items, such as brake pads, batteries, and tires. Additionally, warranties generally have stipulations about operating and maintaining the vehicle in accordance with the supplier's specific recommendations.

Thoroughly examine and become familiar with all the warranties provided with the vehicle when it is delivered. Make sure that you have read all the fine print. Does your warranty really cover 100 percent of all repair costs for the entire period, or does it only cover full replacement in the beginning with reduced coverage thereafter? What items are specifically included or excluded? What is the trade-off on any extended warranty or service agreement? Also, make sure you understand who is going to be responsible for which warranties – is it the vehicle supplier or the local service representative of a component supplier (such as an air conditioning unit or wheelchair lift)?

All vehicles purchased through state contract or competitive bid have warranties which, at a minimum, cover all labor and replacement parts for a period of one year or 12,000 miles (whichever comes first). Warranties cover the basic vehicle and all ancillary equipment supplied with the vehicle (i.e., air conditioner, wheelchair lift, wheelchair tie-down systems, seats, etc.).

No vehicle will be perfect upon delivery and the vehicle manufacturers expect that some adjustments will be needed. Therefore, plan to take the vehicle to the proper facility to correct

these items within the warranty period. It is highly recommended that you take care of problems quickly, before they cause major failures (which often occur after the warranty period). Arguing that you knew of a problem while still under warranty, but could not afford the time to have the vehicle serviced, rarely results in a favorable claim. The end results are that your vehicle may be out of commission for a longer period of time and you may have to pay costly repair bills.

Use the warranties as a basis for future maintenance activities by ensuring that any required servicing is directly incorporated into your preventive maintenance program (e.g., lubrication schedules for lifts). Plan on reviewing the performance and condition of specific warranty-related items and components at a service interval shortly before any major warranty milestones, in order to ensure that you recoup as much benefit as possible from your warranties.

In many cases, extra-cost extended warranties are available. These should be closely examined and related to your operation before any purchase is made. Extended warranties on such items as power trains often have limitation regarding which components are covered. They are often progressive in nature, with a diminishing ability to recover labor and parts costs as time goes by and mileage increases. Therefore, it is essential to think in terms of which combination of conditions are most favorable to you, given your anticipated annual mileage and whether you are able, and authorized to conduct warranty repairs in-house or through a repair shop of your choice.

#### Monitor Suppliers

Tracking your suppliers' performance (price, quality, and reliability) is another essential element of a successful preventive maintenance program. For instance, the quality of your fuel can have a significant impact on the service and repair level required for your engines in these days of electronic controls, fuel injector systems, and catalytic converters.

One area that requires close monitoring is the performance of rebuilt and after-market parts. Rebuilt parts, such as alternators and pumps, may offer up-front cost savings; however, such units may have a shorter operational life than newer parts. By monitoring the life of rebuilt parts, you can determine whether true savings are realized, or whether total cost is actually greater, once you factor in the cost of another rebuilt unit and the labor associated with multiple replacements.

You should also be aware that in many cases involving heavy-duty items, such as starters and compressors, a trade-in (core) unit is required. This "core" generally is not used in your rebuilt unit; instead, it goes on to become the rebuilt product for another operation.

Like rebuilt parts, after-market parts (i.e., new parts built by a company other than the original equipment manufacturer – OEM) may offer up-front cost savings. They may claim to be built to the same or superior specifications as the OEM part, but only through careful monitoring can you determine whether the part's life is truly comparable.

Only through experience will you gain the background necessary to make informed decisions in the future. Good maintenance records and purchasing documentation are essential to learning through experience and must be addresses when you first begin operation, or introduce a new type of vehicle into service.

### Documentation

Another key to any successful maintenance program is up-to-date, accurate record keeping. While documentation is necessary for purposes of budget and control, good records will also enable you to optimize your PM program by providing:

- the database to enable you to establish proper intervals for routine maintenance and servicing;
- information on repetitive failures to establish repair and replacement intervals and the performance of rebuilt or after-market parts and of parts and consumables suppliers;
- early warning of impending major problems through telltale signs, such as increased oil consumption;
- back-up information for warranty claims (particularly marginal claims near the end of the warranty period where supporting documentation can often be the “clincher” in claim payment); and
- Documentation of any personnel related patterns (e.g., more frequent tire or brake replacement on one driver’s vehicle versus fleet average).

In situations where maintenance is conducted by a third party, good documentation is key to minimizing disputes. Under this scenario, management should make the extra effort to review repair bills and develop/maintain the database required for adjustments to the preventative maintenance program. Maintenance is never “out of sight, out of mind” to the smart operator. Tables E and F provide examples of basis record keeping forms.

### Personnel/Departmental Relationships

Consistent execution of a PM program requires the cooperation and interaction of all parties, both in establishing the program and making it work on a day-to-day basis. The following actions will help improve interpersonal relationships and reduce organizational conflicts.

- Involve all parties in development of documentation for inspection items, service intervals, and other inter-departmental maintenance activities.
- Be realistic in your expectations (for example, a proper pre-trip driver inspection will improve reliability, but take 20 minutes to perform).
- Pay attention to administrative details. To whom does the driver turn in a defect report? Who is responsible for notifying maintenance or dispatch of a problem with a vehicle? Who prioritizes the repairs or decides that a vehicle is no longer roadworthy? Who tells maintenance what the future vehicle needs are and how much notice they can expect?

### Training and Diagnosis

Effective training is essential to proper diagnosis of vehicle problems and their subsequent repair or replacement. As vehicles become increasingly complex and reliant upon electronic and computerized controls and monitoring systems, the need for adequate training becomes that much more important.

We suggest that you encourage or even require your mechanics and/or drivers to take advantage of the training offered by vehicle manufacturers and component suppliers. Some manufacturers run training schools on a regional basis and suppliers, as well as converted vehicle manufacturers, may supply service representatives to provide in-house training. In some instances, such as air-conditioning, there is an increasing trend toward mandatory mechanic competence certification.

If you are performing maintenance in-house, purchasing diagnostic equipment is a sound investment. It is essential, in the electronic era, to take as much of the guesswork out of the troubleshooting process as possible. Diagnostic equipment will handsomely repay itself in increased maintenance department productivity and vehicle reliability.

### Who will maintain the Vehicles?

Every maintenance program will be unique due to the mix of vehicle types and ages, fleet size, services provided, and arrangement for maintaining the vehicles. Determining who will perform vehicle maintenance is an important decision. Options include:

- Contracting part or all of your maintenance to commercial mechanics;
- Contracting part or all of your maintenance to other agencies, municipal garages, or others, such as school bus operators; and
- Performing part or all of your maintenance in-house.

Who will perform which elements of your maintenance program will largely depend upon your ability and desire to obtain the staff, parts inventory, equipment, and facilities to perform your own maintenance, as well as your proximity to existing maintenance facilities that can service your vehicles. Remember that if you contract out your maintenance, you still bear the responsibility of verifying and documenting the work performed.

You also need to ensure that if you choose to contract out or keep in house the mechanics are certified mechanic(s). “ASE, is short for the National Institute for Automotive Service Excellence. Since 1972 our independent non-profit organization has worked to improve the quality of vehicle repair and service by testing and certifying automotive professionals. In addition to passing an ASE Certification test, automotive technicians must have two years of on the job training or one year of on the job training and a two-year degree in automotive repair to qualify for certification. The exams are not easy. Only two out of every three test-takers pass on their first attempt. To remain ASE certified professionals must be retest every five years to keep up with ever advancing automotive technology.” — [www.ase.com/about-ase.aspx](http://www.ase.com/about-ase.aspx)

### Summary

Preventive Maintenance is an essential element of every transportation operation. A program tailored to your individual service and vehicle fleet will increase reliability, longevity, and safety. It is important to remember that maintenance may be a dirty job, but must not be

a dirty word. It must not be consigned to some corner, where it can be by-passed by the rest of the operation.

**Example Schedules (See Table A for detailed schedule example)**

Short Trip/City Definition – if any of the following conditions apply for your vehicle(s)

- Most trips are less than 5 – 10 miles
- Most trips include extensive idling (frequent stop/go driving)
- You operate your vehicle in dusty areas

One of the reasons you must follow this schedule under the above conditions is that engine oil breaks down sooner.

Short Trip/City Intervals:

- Every 3,000 miles:
  - Engine oil and filter change (or 3 months, whichever occurs first).
  - Chassis Lubrication (or 3 months, whichever occurs first).
  - Drive Axle Service (or 3 months, whichever occurs first).
  - Every 60,000 Miles: Engine Accessory Drive Belt Inspection
  - Every 90,000 Miles: Fuel Filter Replacement
  - Every 100,000 Miles: Spark Plug Wire Inspection. Spark Plug Replacement. 4.3L V6 Engine Only; Positive Crankcase Ventilation (PCV) Value Inspection.

Long Trip/Highway Definition – If none of the conditions apply from the Short Trip/City Definition. **Do not use this schedule if the vehicle is driven in a dusty or off paved roads.**

Driving a vehicle with a fully warmed engine under highway conditions causes engine oil to break down slower.

- Every 150,000 Miles: Cooling system Service (or every 60 months, whichever occurs first).

Long Trip/Highway Intervals

- Every 7,500 miles: Engine Oil and Filter Change (or 12 months, whichever occurs first). Chassis Lubrication (or 12 months, whichever occurs first). Drive Axle Service (or 12 months, whichever occurs first). Tire Rotation.
- Every 15,000 miles: Automatic Transmission Service (under severe conditions)
- Every 30,000 miles: Fuel Filter Replacement. Engine Air Cleaner Filter Replacement. Front wheel bearing repack (2WD only) (or at each brake relining, whichever occurs first. Automatic Transmission Service. (Severe Conditions).
- Every 50,000 Miles: Automatic Transmission Service (normal conditions).
- Every 60,000 Miles: Engine Accessory Drive Belt Inspection.
- Every 90,000 Miles: Fuel Filter Replacement.
- Every 100,000 Miles: Spark Plug Wire Inspection. Spark Plug replacement. 4.3L V6 Engine Only: Positive Crankcase Ventilation (PCV) Valve Inspection

- Every 150,000 Miles: Cooling System Service (or every 60 months, whichever occurs first).

### **ITD-PT Useful Life Standards for Vehicle Replacement**

In accordance with FTA guidelines, ITD-PT has established minimum useful life standards for vehicle replacements funded with federal dollars.

Category	Typical Characteristics			Minimum Life (whichever comes first)	
	Length	Approx. GVW	SEATS	Years	Miles
Light Duty Small Bus, Cutaway, or Modified Van	16 – 28 ft.	6,000 to 14,000	8 to 12	4	100,000
Light Duty Mid-sized Bus	20 – 30 ft.	10,000 to 16,000	16 to 25	5	150,000
Medium Duty and Purpose Built Bus	30 ft.	16,000 to 26,000	22 to 30	7	200,000
Heavy Duty Small Bus	30 ft.	26,000 to 33,000	26 to 35	10	350,000
Heavy Duty Large Bus	35 to 48 ft.	33,000 to 40,000	27 to 40	12	500,000

Grant recipients are eligible to replace vehicles that have met or exceeded vehicle useful life standards as follows:

1. When an Subrecipient requests to replace a vehicle by meeting or exceeding the useful life standards of age and mileage, and vehicle condition will be considered, prior to the new vehicle being placed in service, as shown on page 9.
  - a. Vehicle condition: If a vehicle is in poor condition having excess maintenance costs we will take this in to consideration or other safety issues. It may also require replacement, this standard will need documentation.
  - b. A vehicle replaced through a ITD-PT grant may be disposed of by:
    - Selling it in a public venue such as an auction (goal is to get the highest return) - net proceeds from selling must be used for next **vehicle** purchase;
2. Transferring it to another transportation provider;
3. Keeping it as a spare or back-up.
4. Regardless of the method of disposal, any vehicle being disposed of must have a free and clear title. Subrecipients must request the title to be released by ITD-PT even when a vehicle will be “junked.” The wrecking company will need to provide the title to DMV showing that the vehicle is no longer operational.

5. If kept for spare or back-up service or transferred to another public Subrecipient, the vehicle can only be replaced **once** through a ITD-PT grant. ITD-PT staff tracks this and confirms a vehicle has not already been replaced when grant applications are reviewed for eligibility.
6. All ITD-PT grant-funded vehicles must be reported through the Subrecipients periodic reports to ITD-PT for as long as the vehicle remains in service, including spare or back-up vehicles.
7. Subrecipients are required to notify ITD-PT if the vehicle has been out of service for 90 consecutive days.
8. Subrecipients are required to notify ITD-PT when the grant recipient can no longer use a vehicle, if the original purpose for the vehicle changes, the service is terminated, the transit project ends, or the Subrecipient is closing or no longer providing public transportation. If the project is at an end or an Subrecipient closes and useful vehicle life remains, ITD-PT will transfer the vehicle to another eligible Subrecipient.
9. Titles are released to the subrecipient when requested for disposal, once useful life standards have been met. When a vehicle is requested to be transferred to another Subrecipient for similar service, ITD-PT releases the title for changes but must remain on the title as first lien holder as long as it is used for public transportation. ITD-PT releases interest in vehicle titles when a vehicle is being sold or donated to Subrecipients that are not providing public transportation.
10. When disposing of a vehicle, the Subrecipient may follow its own rules and procedures for disposing of federally-funded surplus property, as long as the disposal or sale is conducted in an open public process and meets all state or federal laws, rules, and requirements. Subrecipients may sell the vehicle and keep the sales proceeds, but must reinvest the funds for the next vehicle purchase in the transit program for which the disposed vehicle was purchased.

## **Subrecipient Vehicle Life Cycle Management**

Subrecipient should not confuse ITD-PT's vehicle useful life standards with developing a Subrecipients internal vehicle life cycle planning and fleet management policies. ITD-PT's vehicle useful life standards establishes how often federal funds may be used to purchase a replacement vehicle in ITD-PT's grant programs. Many transit Subrecipients continue to safely operate vehicles as part of their fleet well past the ITD-PT useful life standards.

Each Subrecipient providing public transportation services is unique and should adopt appropriate internal vehicle replacement life cycle guidelines. Guidelines should include factors such as service area terrain, road conditions, weather and environmental conditions, age and status of the Subrecipients current fleet, typical vehicle wear and tear, urban or rural driving conditions, passenger safety issues, maintenance service availability and financial constraints. However, once it is no longer cost-effective to retain a vehicle due to high maintenance costs, Subrecipients are encouraged to replace them.

## Vehicle Inventory Requirements

In order to create and manage a vehicle replacement policy, an up-to-date asset inventory is required. ITD-PT has established data guidelines for rolling stock inventories. ITD-PT maintains an Asset Register for all grant-funded vehicles. Subrecipient should maintain a vehicle inventory that includes all rolling stock/passenger service vehicles, whether grant-funded or purchased with other funds. (Vehicles used for Subrecipient purposes, such as maintenance vehicles, are considered equipment and inventory requirements are listed in the Equipment Inventory Requirements below.)

The rolling stock vehicle inventory should include the following data elements and should be updated as new vehicles are acquired or old ones are disposed of or taken permanently out of passenger transportation service. This is the information maintained by ITD-PT, or requested in Subrecipients periodic reports:

- Subrecipients vehicle number (inventory “property tag number”)
- Year of manufacture
- Vehicle Category (from Useful Life Standards – Attachment A)
- Make and model
- Vehicle condition (see below for description categories)
- Seating capacity – total capacity of the vehicle (all ambulatory seats); and capacity when all ADA stations are deployed (if it reduces total capacity).
- Total number of ADA stations
- Fuel type
- Vehicle Identification Number (VIN)
- License number (“plate number”)
- Date placed into revenue service
- Total purchase cost
- Minimum useful life (years and miles) or remaining useful life (annual update required)
- Title holder (will be ITD-PT if grant-purchased)
- Mileage (annual update required)
- Date removed from revenue service (if applicable)
- Disposal method, if applicable: sold at auction, transferred to (Subrecipient), or junked

## Vehicle Condition Descriptions

ITD-PT has established the following vehicle condition definitions, which are tracked by ITD-PT. Subrecipient may also use these definitions in their vehicle inventory. Note that any vehicle in less than good condition, as noted by ITD-PT, requires an explanation on the Subrecipients ITD-PT quarterly reports.

### ***In-Service Vehicles:***

- **New (N)** = Less than 2,500 miles delivered over road from factory or less than 250 miles delivered by truck/rail; in new condition. Once the vehicle is reported as New, the condition would change next quarter to Excellent or appropriate condition.
- **Excellent (E)** = Low mileage in relation to age and no visible or evident mechanical or cosmetic flaws.
- **Good (G)** = Average mileage in relation to the age and only minor mechanical or cosmetic flaws. May include rehabilitated vehicles restored to good condition.
- **Fair (F)** = High mileage and/or noticeable mechanical or cosmetic flaws. Repairs are beginning to exceed normal maintenance schedules.
- **Poor (P)** = High mileage and major mechanical or cosmetic flaws. Non-maintenance repair happening frequently and becoming more costly. Major repairs such as engine or transmission overhaul needed to keep the vehicle in service.

### ***Out-of-Service Vehicles:***

- **Out of Service (O)** = The vehicle is unreliable or is completely inoperable; has been pulled from service due to mechanical or body/chassis flaws that create unsafe operating conditions, or is not ADA compliant. Plan to reinstate, repair, renovate, etc. in order to put it back into service.
- **Disposed (D)** = Vehicle has been retired from service permanently and disposed of (e.g., sold, donated, traded-in on a new vehicle purchase, or removed for scrap if severely damaged).
- **Transferred (T)** = Transferred to another Subrecipient in the area for continued transportation services (e.g., local senior center).

### **Vehicle Safety Standards**

Subrecipient should establish vehicle and driver safety standards which apply to all passenger vehicles and on-board equipment. These standards should address the following elements:

- Subrecipient management commitment to safety. Examples may include: safety policies, an Subrecipient safety committee, a safety communication program for the workplace (such as posters, safety bulletins, safety meetings, etc.), and workplace procedures that include safety elements.
- Operational on-board safety equipment, including fire extinguishers, first aid kit, web cutter, bio-hazard kit, road warning triangles, based on Subrecipient policies
- Ensure communications equipment is working properly and that back-up procedures are in place for emergency communications in areas of poor coverage or “dead spots”

- Driver training for the safe transport of all passengers, including service animals, should include special needs passenger assistance, proper restraints for children, responding to passenger and vehicle emergencies, and requirements for seat-belt use
- Driver training for transporting special needs individuals, including lift operation, storing portable oxygen tanks, securing wheelchairs and non-traditional personal mobility devices, and any other specialized driver training required by the Subrecipient
- Driver first aid and CPR training, should include procedures for dealing with potential blood-borne pathogen spills inside a vehicle
- Vehicle pre-trip and post-trip inspections as outlined in the Preventive Maintenance section of this handbook
- Driver training for driving under challenging conditions such as winter storm driving, techniques for driving in heavy rain, snow and ice, night driving, left turns at intersections, driving in heavy winds, etc. (Optional but strongly recommended.)
- Procedures for vehicle breakdown and unavoidable stops, including safe vehicle evacuation and grouping of passenger outside of the vehicle
- Safety procedures for bus storage and vehicle maintenance facilities, if the Subrecipient operates such facilities, covering both the operation of vehicles inside the facilities, and the safe use of equipment
- Procedures and policies for responding to all hazards, including evacuations, as established by the Subrecipients policies and procedures, and in coordination with emergency first responders in the area. Subrecipients are encouraged to establish inter-Subrecipient agreements and to define how vehicles might be deployed in the event of an emergency - what Subrecipient will be providing drivers, insurance coverage would in place, and procedures are in place in advance

## Disposal of Grant-funded Vehicles

**Subrecipients must contact ITD-PT to receive approval for disposal of a ITD-PT grant-funded vehicle** that has not met the useful life by miles or age or has a value of over \$5,000.00. (See “ITD-PT Minimum Useful Life Standards for Replacement” section, above.) If useful life has been met and/or value is less than \$5,000.00, grant-funded vehicles may be disposed of under the following circumstances: ([see Vehicle Disposition Process](#))

1. Subrecipient has been awarded a grant to replace a vehicle under a ITD-PT or FTA direct grant program. The vehicle must have met or exceeded its minimum useful life. Subrecipients should submit a written or e-mail request for the vehicle title to be released by ITD-PT. Information must include the **Vehicle Identification Number (VIN), year, make/model, mileage, reason for disposal, and intended disposition method.** Subrecipients replacing vehicles have these options for disposal of the old vehicle:

- Disposal by auction or public sale. Subrecipient may follow local procedures for disposal as long as the process involves an open public bid or auction process. Sale proceeds must be retained in the transit program under which the vehicle was initially acquired and used to reduce the cost of the next vehicle purchase. Subrecipient should maintain a copy of documentation in the vehicle file, including page of auction or bid notice listing the vehicle, the sales receipt showing vehicle purchase price, and any other relevant documentation. ITD-PT will require copies or review this documentation, which must be retained for three years after disposal.
  - Disposal by trade-in on purchase of a new transit vehicle. New vehicle must be for the same grant program as disposed vehicle was purchased for.
2. Subrecipient requests to transfer the vehicle to another public or nonprofit Subrecipient providing public transportation. Contact ITD-PT prior to the transfer to determine if the Subrecipient and its service are eligible. ITD-PT staff may consult with the possible eligible Subrecipient for that jurisdiction if useful life standards have not been met.
    - a. If eligible the new Subrecipient should maintain a file copy of the transfer agreement and a copy of the Driver and Motor Vehicles (DMV) title transfer documenting the transfer of the vehicle between Subrecipients. ITD-PT must remain on the title as first security interest holder and the new title will be held at ITD-PT.
    - b. If within the useful life standard, the vehicle transfer must be approved by ITD-PT. The receiving Subrecipient must use the vehicle for public transportation within the same grant program for which the vehicle was initially acquired. Subrecipients must request that ITD-PT release vehicle title for purposes of the transfer, and must ensure that the new title lists ITD-PT as first security interest holder. Transferring Subrecipient may request reimbursement of local match at the awarded percentage based on the current fair market value of the vehicle.
    - c. If the vehicle has met or exceeded the useful life standards, the vehicle can be sold, transferred or donated. Subrecipients must request that ITD-PT release vehicle title, but ITD-PT will not continue as security interest holder if it is no longer being used in public transportation service provision. (Example, donated to a local church or other nonprofit organization.) Net proceeds still need to be used for the next vehicle purchase.
    - d. If a provider stops providing transportation services the vehicle(s) will be transferred to an eligible provider that is willing and has agreed to continue the transportation services in the area. The vehicle(s) will be used for the same purpose as the original grant intended. The remaining balance of preventive maintenance grant(s) will be transferred from the provider ceasing service to the provider accepting responsibility of the vehicles.
  3. Casualty Loss: if a vehicle is withdrawn from service due to damage from an accident, theft, or vandalism, the Subrecipient must immediately notify ITD-PT. The following actions will be taken:

- a. If the damaged vehicle can be repaired, the Subrecipient is responsible to make necessary repairs to restore the vehicle to its original working condition. The cost of such repairs shall be borne by the Subrecipient, from local funds, and/or insurance proceeds.
- b. If the vehicle cannot be adequately repaired, is stolen, or otherwise unrecoverable, the following steps must be taken:
  - i. Insurance adjustor determines the Fair Market Value (FMV) of the vehicle at the time it was removed from service. The transit Subrecipient will need to provide the last mileage reading and condition.
  - ii. The transit Subrecipient will promptly file an insurance claim for damage or loss of vehicle. ITD-PT will be provided a copy of the insurance claim, and subsequent correspondence with the insurance carrier or agent.
  - iii. The preferred action is for the Subrecipient to use insurance proceeds, plus any additional local funds required, to replace the vehicle.
  - iv. Transit Subrecipient would request ITD-PT to release the vehicle title. When a new vehicle is purchased, ITD-PT must be the first security interest holder (lien holder) on the title of the new vehicle.
  - v. If for some reason the Subrecipient determines that it can meet existing service levels without replacing the vehicle, or for some other reason does not plan to replace the vehicle, contact ITD-PT. The Subrecipient will be required to use the insurance proceeds to pay ITD-PT the grant share at the current FMV of the vehicle.

## **EQUIPMENT ASSET MANAGEMENT**

ITD-PT has established management standards for grant-purchased equipment similar to those established for rolling stock. Grant-purchased capital equipment has a value of \$5,000 or more and a useful life of at least one (1) year. Examples:

- Vehicle Equipment – additional, unique components such as fare boxes and bike racks
- Shop Equipment for vehicle maintenance
- Computer Equipment and Software required to put the equipment into service (such as servers, PCs, printers, etc.)
- Computer software systems of \$5,000 or more such as scheduling software, maintenance/fleet management software, etc.
- Communications Equipment (includes telephone systems, radio systems, and security systems with an aggregate cost of \$5,000 or more)
- Security and Surveillance Equipment (includes lighting, and video surveillance systems)

- Light-duty sedans, cargo vans, and trucks that are **not** used for passenger transportation (such as maintenance vehicles, staff vehicles, etc.)

### Equipment Minimum Useful Life Standards for Replacement

ITD-PT has established minimum useful life standards for grant-funded equipment. These standards were established in accordance with FTA guidelines, and reflect a combination of industry standards, ITD-PT experience, consultation with engineers, and consultation and research with other state counterparts. The minimum useful life standards for equipment are noted below. Please note these are established for grant replacement purposes only; they do not necessarily reflect your Subrecipients internal equipment life cycle expectations.

Description of Equipment	Useful Life in Years
Computer equipment, software, and other office equipment	5
Communications equipment (mobile radios, base stations)	5
Surveillance equipment (cameras, etc. for vehicles or facilities)	5
Shop equipment (e.g., vehicle lift, bus washing, tire changers, etc.)	15
Fare boxes	10
Wheelchair lift = same as useful life of the vehicle on which it is installed	
Light-duty vehicles, non-rolling stock	4 or 100,000 miles

### Equipment Inventory

ITD-PT has established guidelines for inventorying capital equipment and maintains an inventory for all grant-funded capital equipment. Local transportation Subrecipients should maintain an internal equipment inventory which includes all capital equipment, whether grant-funded or paid for with other funds. The inventory should include the following data elements and should be updated as new equipment is acquired or old equipment is replaced. Expected replacement date may also be included. If it is, it should be updated annually. Subrecipients internal equipment ID number (inventory property “tag number” identifying the asset as federally-funded)

- Year of manufacture
- Equipment condition (use vehicle condition categories in previous section as a guide)
- Serial Number
- Date placed into service
- Total purchase cost (OPTIS asset register set-up will show which grant funded the purchase)

- Minimum useful life or remaining useful life (annual update required)
- Date removed from service (if applicable)
- Disposal method (if applicable; e.g., “auction sale”)

## **Equipment Maintenance Plans**

All grant-funded equipment, or equipment purchased as part of a capitalized system (i.e., computer network or communications system) should have a basic, written maintenance plan. Maintenance plans should be within 20% of the manufacturer’s recommended timelines, and should include any required warranty service or inspections, as well as a schedule of preventive maintenance. Record-keeping should include a file with copies of all procurement documents, such as the purchase order, manufacturer’s specifications and warranty, and a schedule of inspections, service, and repairs which were done for the equipment. These records must be maintained as long as the equipment is used in the service or program it was purchased for, plus three additional years.

Please refer to the section on Vehicle Preventive Maintenance Plans for further guidance and examples. Generally, except for very costly items, equipment maintenance plans do not have to be as detailed as vehicle maintenance plans. Maintenance schedules should be based on safety and risk considerations, the cost of the equipment, whether it has moving parts, and follow instructions in the materials provided by the manufacturer.

## **Equipment Safety**

All Subrecipients should have a safety program that includes equipment safety. In particular, shop equipment and non-rolling stock vehicles present safety risks which should be addressed through a safety plan.

- Subrecipient management commitment to safety may include safety policies, a Subrecipient safety committee, a safety communication program for the workplace (such as posters, safety bulletins, etc.), and incorporating safety elements into workplace procedures, as appropriate.
- Appropriate safety response equipment, including fire extinguishers and first aid kits, eye washes, bio-hazard kits, etc., should be provided. Office and maintenance facilities are regulated under Idaho Occupational Safety and Health Administration (OSHA) workplace safety guidelines, and should comply with all pertinent safety requirements. A link to OSHA information may be found at the end of this section.
- Operator training for all grant-funded equipment should include initial training upon installation (typically provided by the manufacturer’s representative or local dealer), and refresher training for new employees
- A sufficient number of employees should be trained in first aid and CPR to respond quickly to emergencies. Procedures for emergency response and public safety information should be provided to employees as recommended by local first responder

## Subrecipients

- Safety procedures for non-rolling stock vehicles should be included in the Subrecipients general safety policies and procedures, and should reflect the same standards as driver safety procedures for rolling stock vehicles, excluding procedures for transit passengers

## Disposal of Equipment

Generally, requirements for approved disposal of grant-funded equipment follow the requirements for disposal of vehicles, although ITD-PT does not hold title to equipment. Please refer to the section of Disposal of Grant-funded Vehicles for more detailed information and requirements.

Grant-funded equipment must meet or exceed established minimum useful life standards for replacement with ITD-PT grant funds.

Equipment may be disposed of through the following methods:

- Sale by open bid process or public auction
- Trade-in for replacement equipment
- Transfer to a public or nonprofit Subrecipient
- Donation to a charity if value is under Subrecipient threshold for capital
- Disposal and required replacement due to damage, theft, or vandalism

Sale of used equipment is a common method of disposal. Subrecipients should make every effort to sell items for the highest price. Sale proceeds must be used for the purpose of the original grant program. If the item has a sale value of \$5,000 or more, it must either be used as match for a new equipment purchase or used in provision of service in the same program that funded the original purchase. ITD-PT encourages Subrecipients to contact the ITD-PT program manager with questions regarding the disposal of grant-purchased equipment, and to review options for use of sale proceeds.

# FACILITIES ASSET MANAGEMENT

Facilities include the following capital assets:

- Passenger shelters
- Signs
- Amenities such as passenger benches and bicycle lockers
- Bus barns and storage sheds
- Bus parking areas
- Bus maintenance facilities
- Transit infrastructure such as transfer facilities
- Park and ride lots, facility parking lots, sidewalk improvements
- Transit administration facilities

For ITD-PT grant project purposes, capital facilities projects fall into two general categories:

**1. Passenger Shelters, Signs and Amenities.** These are small to moderate projects with limited planning, permitting, documentation and environmental review requirements. These projects can generally be accomplished within existing Subrecipient staff assignments and resources and have a shorter implementation schedule. Passenger shelters are often purchased pre-fabricated, as are most amenities such as benches and bicycle lockers. Assembly and installation requirements are usually minimal to moderate. ADA accessibility is a requirement for all facility projects.

**2. Structures and Facilities.** These are major projects involving significant physical improvements and structures, from paving parking lots to constructing large facilities such as bus barns, maintenance shops and transit centers. These projects require dedicated construction management resources and may require significant planning, public involvement, permits, inspections and environmental review. Project awards are accomplished through formal Sealed Bid or Request for Proposals. Time schedules for major structures and facilities projects can range from two to three years and these projects require a major commitment of Subrecipient staff resources.

## Capital Facilities Minimum Useful Life Standards for Replacement

ITD-PT has established minimum useful life standards for capital facilities replacement. These standards were established in accordance with FTA guidelines and reflect a combination of industry standards, ITD-PT experience, consultation with engineers, and consultation and research with other state counterparts. The minimum useful life standards for facilities are listed below. Please note these are established for grant replacement purposes only; they are not intended to reflect your Subrecipients internal facility life cycle expectations.

Description of Equipment	Useful Life in Years
Passenger shelters (pre-fabricated metal and glass/Plexiglas and stick-frame)	10
Signs and sign poles	10
Amenities: (e.g., benches and on-ground bicycle lockers or racks)	15
Equipment sheds > 300 square feet (pre-fabricated and erected on site)	20
Any "stick frame" constructed building/structure This includes: bus barns, maintenance shops, administrative offices	40
Concrete/pavement infrastructure (bus parking areas, passenger transfer stations, park-and-ride lots, transit malls)	20
Security fencing (permanently installed metal cyclone-type)	15
Office furnishings within buildings (e.g., office partition systems, desks, filing cabinets, etc.)	10
Land	perpetual useful life does not expire on land purchases
Renovations to existing grant-funded facilities	allowable maximum of once every 10 years; each proposed project will be reviewed separately, on its own merit

## Facilities Inventory

ITD-PT has established data guidelines for inventorying capital facilities and maintains an inventory for all grant-funded capital facilities. Local transportation subrecipients should maintain an internal inventory which includes all facilities, whether grant-funded or acquired with other funds. There are two levels of inventory requirements, based on the type, size and cost of the facility. The inventory requirement for bus shelters and other small capital facilities is less detailed, whereas the inventory requirement for structures and facilities reflects the significantly higher investment in those facilities.

### Bus Passenger Shelters, Signs, and Amenities – Inventory Requirements

- Facility/item location – the street address, or nearest cross-streets and side of street (North, South, East, West) where the shelter or amenities are located.
- One-sentence description of the asset.
- Identifying inventory property tag number or item code assigned by the local Subrecipient.
- Month and year of installation.

- Original cost of facility/item, including applicable federal share, state share, and local share. (ITD-PT Inventory will show which grant funded the project)
- Current condition and remaining grant replacement useful life (use same categories listed under “Vehicle Condition Descriptions” section for identifying condition and see “Facilities Minimum Useful Life Standards for Replacement,” above).

### **Structures and Facilities – Inventory Requirements**

- Facility name (if applicable) and address. The full name of the facility as it appears on the legal deed (e.g., “City of Dover, Edwin R. Burton Transit Facility”) and the legal street address.
- Brief general facility description including purpose/function of the facility, transit programs served, number of floors and square footage.
- Facility number or code assigned by the local Subrecipient.
- Facility occupancy rating by local or state fire marshall.
- Date the occupancy permit allows facility to be used.
- Original total cost of facility, including applicable federal share, state share, and local share. If real estate acquisition was part of the grant project, that cost should be included in the total project cost. (OPTIS asset register set-up will show which grant funded the project.)
- For facility renovations: Date completed, square footage, and project cost of all major facility renovations or additions, including federal and state grant shares, if funded in a ITD-PT grant.
- A list of the major building infrastructure equipment systems, including (but not necessarily limited to) elevators, central fans/blowers, HVAC chillers and heaters, cooling towers, emergency power generators, and waste disposal equipment – including manufacturer’s serial numbers.
- Current building condition (use same categories listed under “Vehicle Condition Descriptions” section for identifying condition, and see “Facilities Minimum Useful Life Standards for Replacement,” above.)

### **Facility Management Plan**

**All grant-funded facilities must have a written facility management plan.** This is both an ITD-PT and FTA requirement. The facility management plan must be completed and a copy submitted to ITD-PT prior to final payment.

There are two levels of management plan requirements, based on the type, size and cost of the facility. Bus shelters and other small capital facilities only require a maintenance plan. Structures and facilities require additional information.

## **Bus Passenger Shelters, Signs and Amenities – Maintenance Plan Requirements**

A facility maintenance plan should include the following components:

- A facility inspection program should include a form or checklist, a schedule and dates of periodic inspection (typical inspection areas would include roof, flooring, plumbing and electrical panels);
- A maintenance schedule for installed equipment, appliances and furnishings, based on manufacturer recommendations for each item or system (for example, HVAC equipment);
- A process for managing and monitoring any facility-related warranties, including installed equipment;
- A procedure for follow-up repairs arising from building inspections, as well as for unplanned equipment breakdowns of installed equipment and documentation such as a form (example: work order) or online system for recording the repairs.

## **Structures and Facilities – Facility Management Plan Requirements**

Management Plans for major capital facilities should include the following components:

1. Subrecipient's goals and objectives for management of the facility, and how these were established.
2. A copy of the facility inventory (see section above).
3. Subrecipient organization chart and description of facility maintenance responsibilities that includes management, supervision, and maintenance staff—who is responsible for what activities (whether done by staff, contracted or both).
4. Facility and Building Equipment Maintenance Plan. Building equipment maintenance should be based on manufacturer's recommendations and should include required warranty service or inspections, as well as a schedule of preventive maintenance. Record-keeping should include a permanent central file with copies of purchase orders, manufacturer's specifications, warranties, and a historical schedule of inspections, service, and repairs conducted on the building equipment. This plan should address preventive maintenance servicing as follows:
  - a. A preventive maintenance servicing and inspection schedule for each major equipment component or system in the facility. This would include heating, ventilation and air conditioning systems (HVAC), plumbing, electrical, fire alarms, sprinkler systems, lighting and public announcement (PA) systems. The inspection and servicing would include completing preventive or unplanned repairs and would be based on manufacturer's recommendations for the units inspected;
  - b. The facility equipment inspection program should include a form or checklist for monitoring scheduled dates of inspection and whether repairs were required and

document when servicing and repairs were completed;

- c. A process for managing and monitoring facility equipment warranties and, if applicable, service agreements, to ensure all service requirements are met;
  - d. Annual inspections of building infrastructure such as roof, paint (both exterior and interior), windows, flooring, sidewalks, paving, fencing, etc.
  - e. A procedure for documenting annual building infrastructure inspections, any repairs arising from these inspections, and for recording information about the repairs such as what work was done and when;
  - f. A procedure and regular schedule for general building maintenance such as walking through areas for routines such as changing light bulbs, servicing clocks, water coolers, servicing doors and locks, and other general work area maintenance.
5. Facility Custodial Plan:
- a. For out buildings and storage structures, the custodial plan should include trash can or dumpster pick-up schedule, daily restroom cleaning or port-a-potty service schedule, and sweeping or washing paved surfaces, window washing, etc.;
  - b. For indoor facilities, the custodial plan should include waste can and office recycling pick-up, general dusting and surface cleaning, daily restroom cleaning, periodic carpet cleaning and floor washing/waxing, as well as responding to accidental spills.
6. A general plan and periodic schedule for longer term maintenance projects, such as interior and exterior re-painting; roof replacement; and carpet and flooring replacement.

## **Facilities Insurance Requirements**

All major structures and facilities funded under ITD-PT grants must have adequate insurance throughout the life of the facility. Evidence of appropriate insurance coverage (a Certificate of Insurance from the Subrecipients insurance carrier or agent showing ITD-PT listed as additional insured) must be submitted for final payment of any ITD-PT grant funded facility project. ITD-PT must be listed as additional insured and be provided copies of all future insurance coverage notices from the carrier.

The level of insurance coverage should be commensurate with the cost and risk potential for replacing the facility. Commercial building insurance that protects against loss from fire, flood, or other events or defects is appropriate for buildings and constructed facilities. Subrecipients should also carry general liability insurance covering employees and visitors to the facility in the event of injury or accident on the premises.

Please consult with your Subrecipients risk manager and/or insurance broker regarding appropriate insurance coverage for your facility.

## Facilities Safety Program

Grant-funded major structures and facilities should have a Facility Safety and Security Plan. The level of detail and activities in the safety plan should be commensurate with the type and size of the facility, as well as the number of occupants, risk potential of activities and functions performed at the facility, and local regulations, as well as OSHA requirements.

- For out buildings and storage structures, safety issues may include lighting, fencing, call boxes, alarm systems, surveillance equipment and other measures for safe and secure vehicle storage;
- For indoor facilities, safety issues may include responding to emergency events; scheduling fire/earthquake drills; a process for working with local law enforcement to develop appropriate workplace violence and bomb threat response protocols; lock-box protocols with local fire departments; parking and exterior lighting, building key or card control systems, alarm systems, and other measures for safe and secure facilities;
- An annual facility safety inspection by a designated position or group. This inspection must include all safety components and any ADA-related equipment. For larger facilities housing a number of employees, establishing a safety committee is a good way to monitor ongoing safety issues.
- Fueling facilities, facilities that have underground liquid storage tanks and facilities that employ hazardous substances in the course of daily business, such as maintenance shops, have additional safety regulations under State law. Please consult with your local environmental and/or building inspection Subrecipient for these requirements. A link to OSHA requirements can be found at the end of this section.

## Disposal of Facilities

Disposal of grant-funded facilities is not common. Facility categories which are most commonly disposed of and replaced include passenger shelters, signs, amenities such as benches and bicycle lockers, fencing and equipment sheds. Generally, it is not expected or intended that grant-funded major structures and facilities such as buildings or transit infrastructure will be replaced. Subrecipients with these more permanent facilities are more likely to use grant funds for renovations and/or additions.

Grant-funded facilities must meet or exceed established minimum useful life standards for replacement, in order to be replaced under a new grant.

Removable-type facilities such as passenger shelters and amenities may be disposed of through the following methods:

- Transfer to a public or nonprofit Subrecipient
- Public sale or auction

If a grant-funded facility were to be disposed of, Subrecipients would be expected to access a real estate company to assist in the sale and advertise the property via multiple listing services. Most federally-funded facilities other than passenger shelters, amenities and sidewalk construction/parking lots have a restrictive covenant filed on the deed. This is to protect the federal investment and to ensure that ITD-PT is notified and involved in the sale or transfer of the property.

Transferring used facilities such as passenger shelters to other public or nonprofit Subrecipients may be requested. Please contact the ITD-PT capital program manager to discuss transfer plans and requirements.

Subrecipients selling facilities or structures must make every effort to sell such item(s) in a public venue to get the highest price possible. Proceeds of sale must be used for the same grant program that funded the original purchase/installation or construction. If the item has a sale value of \$5,000 or more, proceeds must be used to purchase new amenities. ITD-PT encourages Subrecipients to contact the ITD-PT program manager regarding the disposal of grant-purchased facilities and to review options for using the proceeds.

Facilities damaged or destroyed due to vandalism, fire, or accident should be repaired or replaced using insurance proceeds. Subrecipients must immediately contact the ITD-PT capital program manager in the event a grant-funded facility is severely damaged or destroyed from vandalism, fire, accident, or other causes.

## RESOURCES

### Federal Publications

#### [Code of Federal Regulations \(CFR\) 49](#)

- Part 611: Major Capital Investment Projects

[http://www.access.gpo.gov/nara/cfr/waisidx\\_09/49cfr611\\_09.html](http://www.access.gpo.gov/nara/cfr/waisidx_09/49cfr611_09.html)

- Part 633: Project Management Oversight

<http://www.gpo.gov/fdsys/pkg/CFR-2009-title49-vol1/content-detail.html>

### **Federal FTA Circulars**

FTA Circular 9070.1G - Enhanced Mobility of Seniors and Individuals With Disabilities Program Guidance, at:

[http://www.fta.dot.gov/documents/C9070\\_1G\\_FINAL\\_circular.pdf](http://www.fta.dot.gov/documents/C9070_1G_FINAL_circular.pdf)

FTA Circular C-5010.1D - Chapter IV: Project Management at

[http://www.fta.dot.gov/documents/C\\_5010\\_1D\\_Grant\\_Management\\_Requirements\\_2012\\_Page\\_Changes\\_8-27-2012.pdf](http://www.fta.dot.gov/documents/C_5010_1D_Grant_Management_Requirements_2012_Page_Changes_8-27-2012.pdf)

FTA Circular C-5800.1, Safety and Security Management for Major Capital Projects, at:

[http://www.fta.dot.gov/legislation\\_law/12349\\_6930.html](http://www.fta.dot.gov/legislation_law/12349_6930.html)

FTA Circular 9300.1B Capital Investment Program Guidance and Application Instructions, at:

[http://www.fta.dot.gov/documents/Final\\_C\\_9300\\_1\\_Bpub.pdf](http://www.fta.dot.gov/documents/Final_C_9300_1_Bpub.pdf)

### *Other Useful National Organization Publications*

Federal capital Project and Construction Management Handbook at:

<http://www.fta.dot.gov/documents/FTA-CONSTRUCTION-PRJT-MGMT-HDBK2009.pdf>

Federal Transit Administration – Procurement best Practices, at:

[http://www.fta.dot.gov/13057\\_6037.html](http://www.fta.dot.gov/13057_6037.html)

Community Transportation Association of America (CTAA) – website

<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=23&z=2>

## **State Publications**

Occupational Safety and Health Administration at: <https://www.osha.gov/oshdir/id.html/>

OSHA safety rules at: <https://www.osha.gov/law-regs.html>

ITD-PT State Management Plan at:

<http://www.itd.idaho.gov>

Click on Public Transportation

[Idaho Procurement Rules, Policies and Statues](#)

[Example of Templates and Forms](#)

ITD-PT Vehicle Disposition Process

**Table A**  
**Vehicle Schedule Maintenance (Example)**

The U.S. Environmental Protection Agency recommends that all required maintenance services be performed at the indicated interval and the maintenance be recorded. ITD-PT will also require a detailed maintenance log on every vehicle until the title has been released to you after the recommended useful life of the vehicle have been reached. NOTE: It is imperative to conduct all required maintenance on vehicles and continue updating the maintenance schedules provided by ITD-PT.

Note: Individual Preventive Maintenance Schedules should be accomplished for each vehicle assigned to your fleet.

The services shown in this schedule up to 100,000 miles should be performed after 100,000 at the same intervals. The services shown at 150,000 miles should be performed at the same interval after 150,000 miles.

Vehicle ID # \_\_\_\_\_ Vin # \_\_\_\_\_

Year/Make/Model: \_\_\_\_\_

Vehicle License # \_\_\_\_\_

<b>3,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three (3) months, whichever occurs first)</li> <li>• Lubricate chassis components (or three (3) months, whichever occurs first)</li> <li>• Check rear and front axle fluid levels and add fluid as needed</li> <li>• Check and repair wheel chair operations</li> </ul>			
<b>6,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check front and rear axle fluid levels and add fluid as needed.</li> <li>• Rotate tires per manufacturer specifications.</li> <li>• Check and repair wheelchair operations</li> </ul>			
<b>9,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>12,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>15,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions.</li> <li>• In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>• In hilly or mountainous terrain.</li> </ul>			

		<ul style="list-style-type: none"> <li>• Delivery service or “stop” and “go” driving</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>18,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>21,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>24,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>27,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>30,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions. <ul style="list-style-type: none"> <li>○ In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>○ In hilly or mountainous terrain.</li> <li>○ Delivery service or “stop” and “go” driving</li> </ul> </li> <li>• Replace engine air filter.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>33,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>36,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>	
<b>39,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
		<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> </ul>	

<ul style="list-style-type: none"> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>42,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>45,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions. <ul style="list-style-type: none"> <li>○ In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>○ In hilly or mountainous terrain.</li> <li>○ Delivery service or “stop” and “go” driving</li> </ul> </li> <li>• Inspect engine air filter. Replace if necessary.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>48,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations</li> </ul>			
<b>51,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>54,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>57,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>			
<b>60,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions. <ul style="list-style-type: none"> <li>○ In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>○ In hilly or mountainous terrain.</li> <li>○ Delivery service or “stop” and “go” driving</li> </ul> </li> <li>• Replace engine air filter.</li> <li>• Inspect engine accessory belt.</li> </ul>			

			<ul style="list-style-type: none"> <li>• Rotate Tires.</li> <li>• Replace Fuel Filter.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>63,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>66,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>69,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>72,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>75,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions. <ul style="list-style-type: none"> <li>○ In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>○ In hilly or mountainous terrain.</li> <li>○ Delivery service or “stop” and “go” driving</li> </ul> </li> <li>• Inspect and or Replace engine air filter.</li> <li>• Inspect engine accessory belt.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>78,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>81,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>84,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> </ul>

			<ul style="list-style-type: none"> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>87,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>90,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Clean and repack the front wheels bearings</li> <li>• Change automatic transmission fluid and filter under the following conditions. <ul style="list-style-type: none"> <li>○ In heavy city traffic where the outside temp. reaches 90 degrees F or higher.</li> <li>○ In hilly or mountainous terrain.</li> <li>○ Delivery service or “stop” and “go” driving</li> </ul> </li> <li>• Replace engine air filter. Replace Fuel Filter.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>93,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>96,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Rotate Tires.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>99,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Change engine oil and filter (or three months, whichever occurs first).</li> <li>• Lubricate chassis components (or three months, whichever occurs first).</li> <li>• Check rear and front axle fluid levels and add fluid as needed.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>100,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Inspect Spark Plug Wires.</li> <li>• Replace Spark Plugs.</li> <li>• 4.3L V6 engine only. (Inspect or replace Positive Crankcase Ventilation (PCV) Valve.</li> <li>• Check and repair wheelchair operations.</li> </ul>
<b>150,000 Miles</b>	<b>Date</b>	<b>Mileage</b>	<b>Serviced By</b>
			<ul style="list-style-type: none"> <li>• Drain, flush, and refill cooling system (or every 60 months since last service).</li> <li>• Inspect hoses.</li> <li>• Clean radiator, condenser, pressure cap, and neck. Pressure test cooling system and pressure cap.</li> <li>• Check and repair wheelchair operations.</li> </ul>

**Table B**  
**Vehicle Example Inspection Form**

Inspections are a key element in the early detection and remedy of potential failures. Both drivers and mechanics should perform them, to varying degrees. Investing a short time on a daily basis to inspect each vehicle will help detect problems, thereby improving safety, decreasing vehicle repair costs and vehicle downtime.

Drivers **MUST** perform a regular pre-trip inspection of the vehicle in addition to inspecting the vehicle when it is cleaned and refueled.

See Pages (36-37) for example Form for large vehicle  
See Page (38) for Exterior example of issues

## Vehicle Inspection Form

Date: \_\_\_\_\_ Driver Name (Print) \_\_\_\_\_

Vin # \_\_\_\_\_ Vehicle # \_\_\_\_\_ Starting Miles: \_\_\_\_\_ Time am/pm): \_\_\_\_\_

OK	Attention Needed	Unsafe	Description	OK	Attention Needed	Unsafe	Description
<b>UNDERCARRIAGE</b>				<b>CONTROL PANEL</b>			
			LEAKS				DASH LIGHTS
			REAR SPRINGS AND SHACKLES				INTERIOR LIGHTS
			FRONT AND REAR JOINTS				GAUGES
			DRIVERSHAFT CENTER SUPPORT				HEADLIGHTS AND RUNNING LIGHTS
			U-JOINT				LICENSE PLATE LIGHT
			TRANSMISSION FOR LEAK				DIMMER SWITCH
			SHIFT AND LCUTCH LINKAGE				BREAK LIGHTS/BRAKE PEDAL CLEARANCE
			FRONT SUSPENSION AND SHOCKES				DIRECTIONAL SIGNALS
			STERRING LINKAGE				EMERGENCY FLASHER
			EXHAUST SYSTEM				REVERSE LIGHTS
							BACKUP ALARM
<b>UNDER HOOD</b>							HORN
			PRESSURE TEST COOLING SYSTEM				WINDSHIELD WIPER OPERATIONS
			COOLANT/ANTIFREEZE	<b>BODY EXTERIOR</b>			
			BREAK FLUID LEVEL				ALL WINDOWS
			POWER STEERING FLUID LEVEL				SIDEVIEW MIRRORS
			BATTERY AND CABLES				BODY PARTS FOR LOOSENESS
			STARTING AND CHARGING SYSTEM				WINDSHIELD WIPER BLADES
			WINDSHIELD WASHER FLUID				BUMPERS FOR DAMAGE AND LOOSNESS
			TRANSMISSION FLUID	<b>BRAKES</b>			
<b>TIRES</b>							SHOES AND PADS FOR WEAR
			TIRE WEAR/TREAD SEPERATION				BRAKE LINES FOR LEAKS
			NAILS/GLASS ETC				BRAKE VACUUM HOSES
			AIR PRESSURE				BRAKE ADJUSTMENT
			LUGNUTS (MISSING/CHECK FOR TIGHTNESS)				EMERGENCY BRAKE

<i>OK</i>	<i>Attention Needed</i>	<i>Unsafe</i>	<i>Description</i>	<i>OK</i>	<i>Attention Needed</i>	<i>Unsafe</i>	<i>Description</i>
<b>ENGINE</b>				<b>BODY INTERIOR</b>			
			ALL FUEL LINES/CONNECTIONS				FIRST AID KIT
			ALL BELTS FOR TIGHTNESS				FIRE EXTINGUISHER
			BELTS FOR SIGNS OF WEAR				SEATS – TEARS AND/OR LOOSENESS
			FOR LOOSE WIRING				FLOORS FOR TEARS
			FOR VACUUM LEAKS				LOOSE WHEEL CHAIR TRACKS
			AIR FILTER				FAREBOX DECURENESS
			ACCELERATOR LINKAGE				EMERGENCY EXIT
			CHANGE OIL FILTER				WINDOW OPERATIONS
<b>ACCESSORIES</b>							REVIEW MIRRORS
			HEARTER OUTPUT				LOOSE BODY PARTS
			AIR CONDITIONER OUTPUT				WHEELCHAIR LIFT OPERATION
							WHEELCHAIR TIE DOWNS ( <b>REQUIRED FOR SERVICE</b> )
							PATHOGEN KIT
							RADIO/CELL PHONE OPERATIONAL

Ending Miles: \_\_\_\_\_ Fuel added: Gal \_\_\_\_\_ \$ \_\_\_\_\_

Time (am/pm) \_\_\_\_\_

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

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



