



San Joaquin County Asset Acquisition Process

Notice of Asset Request

- Contact from Department
- Proposed Equipment Requests
- Contact from Purchasing
- Determined in prior year by Fleet Services

Identify Customer Needs

- Review Asset Requirements with Customer
- Write Specifications for Bid Purpose
- Update any changes from existing vehicle
- Confirm Specifications with Customer
- Customer to submit Purchasing Requisition
- Fleet Services submits Purchasing Requisitions for all Fleet vehicles

Coordinate with Purchasing-Bidding

- Requisition to Specifications
- Bid follow-up questions
- Review of Bids for Compliance
- Recommend Award to Purchasing

Coordinate with Purchasing-Receiving

- Track and coordinate PO with Vendor
- Receive vehicle and inspect
- Accept or Deny asset based upon specs
- Assign County Asset Tag and input into CAPS
- Direct the outfitting of vehicles to customer needs
- Send DMV Registration to Purchasing
- Receipt and pay for Fleet assets
- Forward invoices for department purchases

Final Issuance

- Set-up Vehicle Account
- Fueling Access set-up
- PMs Set-up in system
- Release vehicle to customer
- If replacement, Surplus recovery coordination





Specification Development & Bidding

Collect Department Contact Information

- Requisitions for assets
- Purchase approval authority
- Asset specification approval authority
- Purchase order payment authority

Determine Customer Requirements

- Hybrid feasibility
- Specific task requirements
- Special body requirements
- Mandated equipment
- Branding and identification
- Safety issues
- Law & regulation compliance



Develop Asset Specifications

- Incorporate customer requirements into asset specifications
- Develop specifications based upon market availability and customer requirements
- Review specifications with department contact identified as asset authority
- Edit specifications as needed until customer requirements are satisfied
- Secure final approval of asset specifications

Finalize and Submit for Bidding

- Forward specifications to Purchasing
- Purchasing collects bidder specification inquiries
- Fleet Services responds to inquiries
- Purchasing issues addendums to bids
- Bidding closes

Determine Acceptable Bids

- Bids are reviewed for specification compliance
- Unacceptable bids are culled
- The lowest-cost bid meeting specification is selected for purchase.

Purchase & Receive Asset

- Issue PO to successful bidder
- Place order
- Receive asset and check for specification compliance
- Accept or reject asset
- Accepted assets are incorporated into County fleet
- Rejected assets are returned for compliance or replacement



Asset Incorporation, Fitment, and Issue

Asset Incorporation

- Asset is assigned a vehicle number which serves as the asset tag
- Fuel access is given to asset
- Asset information and PM schedules are entered into the fleet management system
- Assets are branded, numbered, and all advertising is removed



Fitment of Auxiliary Equipment or Special Body to Asset

- Additional equipment needed to satisfy customer requirements is ordered and installed by Fleet Services
- Large fitments, such as utility bodies will be installed by third-party vendors, contracted by Fleet Services and Purchasing



Issue of Asset to End User

- Department reviews asset concerning user requirements and fitment of use
- Fleet Services to add to or modify asset to meet requirements
- Department accepts and utilizes asset

