AGENDA

Essentials of Fleet Management Seminar – The Toolkit
Oct 26th, 28th and 30th and Nov 2nd and 4th
3:00 – 5:00 PM EST

Monday, October 26

3:00 – 4:00 PM: Introduction & the NAFA Competency Model

NAFA has a structured approach to education, built around the Education Competency Model. The model covers 8 fleet disciplines. Learning is enhanced through the networking opportunities in NAFA Communities. Learn about these resources and take a Threshold Knowledge Test (TKT) to get started. Also, get introduced to Fleet ABC which will provide the basis for practical exercise as we apply 8 tools from the Fleet Management Toolbox.

4:00 – 5:00 PM: Asset Management Tool - Select the Right Vehicle

Asset management and fleet management are almost synonymous and involve the cradle to grave oversight of fleet assets. Add the first tool to your toolbox by learning NAFA’s four-step vehicle selection process and confirm through a practical exercise that you can select the right vehicles for your organization’s needs.

Take-Away Tool – Vehicle Selection Matrix

Presented by: Kate Vigneau, CAFM and Mike Camnetar, CAFM

Wednesday, October 28th

3:00 – 4:00 PM: Business Management Tool - Write Robust Fleet Policies

Fleet Managers must demonstrate a wide range of business management skills. One of the most important skills, and one many fleet professionals struggle with are writing comprehensive fleet policies. The second tool in your toolbox will be a how-to guide and templates for a robust policy framework.

Take-Away Tool – Policy Templates
Wednesday, October 28th – Cont.

4:00 – 5:00 PM: **Information Management Tool – Create an Effective Reporting Matrix**

Without the ability to harness the realms of information available across various systems, your ability to manage your fleet is diminished. Learn how to determine who needs what information, at what frequency and in what format. Tool #3 is a reposting matrix custom-designed for your needs.

**Take-Away Tool** – Fleet Reporting Matrix

**Presented by:** Ray Brisby, CAFM and Patti Earley, CAFM

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**Friday, October 30th**

3:00 – 4:00 PM: **Maintenance Management Tool – Determine Optimal Shop Staffing Levels**

Whether you operate your own garage or want to understand if a third-party shop is running efficiently, you need to understand Vehicle Equivalency Unit (VEU) analysis. The fourth tool in the toolbox will be learned through a real-life scenario and leave you with an understanding on how to verify optimal shop manning.

**Take-Away Tool** – VEU Analysis Worksheet

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4:00 – 5:00: PM **Fuel Management Tool – Decide on a Fuels Solution That Fits**

There are choices out there and fleet managers need to understand the costs and benefits of various fueling solutions. A review of some of these choices will be covered before using the fifth tool to assess the available options in light of organizational priorities and select the right fuel for you.

**Take-Away Tool** – Fuel Efficiency Performance Measures

**Presented by:** Ray Brisby, CAFM and Patti Earley, CAFM

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5:00 PM – 6:00 PM: **Networking Social Hour**
Monday, November 2nd

3:00 – 4:00 PM Risk Management Tool – Conduct a Fleet Risk Analysis

This past year has illustrated like never before the risks that fleet employees can face in performing essential functions. Drivers, mechanics, and others all put themselves at risk. Organizations need to be able to identify all risks and select strategies to mitigate potential loss. Tool #6 is the Risk Management Process and a COVID 19 case study will be used to illustrate its usefulness.

Take-Away Tool – Risk Management Grid

4:00 – 5:00 PM Financial Management Tool – Calculate Fleet Lifecycle Costs

Fleet can represent a major cost category for organizations. Fleet decisions should be made based, not on acquisition costs, but on the total cost of ownership (TCO) over the lifetime of an asset. Our 7th tool will be two excel spreadsheets that demonstrate how to calculate the optimum replacement point for an asset and how to determine the vehicle with the lowest TCO between several options.

Take-Away Tool – Lifecycle Cost Analysis Spreadsheet

Presented by: Kate Vigneau, CAFM and Mike Camnetar, CAFM

Wednesday, November 4th

3:00 – 4:00 PM Professional Development Tool – Make Right-Good Ethical Decisions

Fleet professionals are managers, leaders and decision-makers. Naturally, they seek to make decisions that are financially right for the organization and ethically good. Our final tool is the ethical decision-making grid and a practical resource that you will use repeatedly over your career.

Take-Away Tool – The Ethical Decision-making Grid
**Wednesday, November 4th – Cont.**

4:00 – 5:00 PM **Wrap-up**

The wrap-up will consist of a Toolkit Overview, a Q&A session with the Instructor Team and a Confirmatory Quiz. The session will conclude with what’s next at NAFA and for your professional development.

**Presented by: Kate Vigneau, CAFM and Mike Camnetar, CAFM**