



# Fleet Compliance Guide

NAVIGATING TAX CLASSIFICATION PROCESS

GREY FLEET

CO<sub>2</sub> GREY FLEET EMISSIONS

FLEET POLICY

VEHICLE CONDITION AND MAINTENANCE

DRIVER ASSESSMENT, LICENSING AND TRAINING

# Introduction



# Helping You Help Communities

**What attracted you to a career in social and community services? No doubt it was to make a positive impact, to provide real help to those in need, and to go to work each day with a sense of mission and purpose. What you didn't sign up for was to drown in a mire of fleet-related compliance tasks.**

Dedicated Australians work every day to support individuals and communities in critical areas like disability and aged care. Demand is growing and government support is (generally) rising, yet the sector also faces significant challenges. Demographic shifts, funding uncertainties and workforce shortages can make your mission feel daunting, placing additional pressure on your ability to deliver essential services.

Amid these complexities, fleet compliance stands out as a pressing concern. From navigating tax classification to ensuring vehicle condition and managing grey fleet risks, compliance can be overwhelming. Organisations also grapple with responsibilities around fleet emissions, safety standards, and driver behaviour, including assessments, licensing and training.

As compliance officers, finance personnel, fleet managers, nonprofit leaders, and support staff, you play a critical role in ensuring your organisations meet these regulatory requirements. This guide aims to highlight the specific challenges of fleet compliance and introduce you to Interleasing's tailored solutions that may help you.

We understand that in each role fleet compliance can mean different things, in different areas. For example:



## Finance

Understanding fleet compliance is essential for managing costs and ensuring financial health, especially in a landscape where funding can be unpredictable.



## Procurement

Thoughtful procurement strategies can enhance fleet compliance, ensuring vehicles secured meet regulatory standards while providing the best value.



## Compliance

Even if compliance isn't a primary focus, this guide equips organisations with insights to navigate the regulatory landscape effectively.

Let this guide serve as a practical resource to support your fleet management efforts and address common challenges in partnership to continue making a meaningful impact in the lives of those we serve.

# Who is this guide for?



## Not-for-Profits (NFPs)

Defined as an organisation that does not operate for the profit, personal gain or other benefit of particular people. Estimates suggest Australia currently has around 300,000 NFPs, contributing to the charitable sector's revenue of over \$200 billion or 7.8% of Australia's GDP. Generally, NFPs look for fleet solutions that are safe, cost-effective and compliant.



## National Disability Insurance Scheme (NDIS) service providers

Registered Providers are approved by the [NDIS Quality and Safeguards Commission](#) to deliver NDIS-funded supports and services. They adhere to the NDIS Code of Conduct and are regulated by the Commission. There are currently nearly 18,000 registered providers in Australia, many of whom need fleets to provide services to participants in their own homes.



## Social services

This sector includes aged care, family and children's services, disability services, housing and homelessness services and community services. Social services providers need a fleet that supports mobile service delivery and outreach programs, including vehicles for case workers, transport for clients, and potentially specialised vehicles for specific services like disability support.

# Key Compliance Challenges



# Navigating the tax classification process

Navigating the tax classifications for vehicle fleets in NFPs, NDIS service providers, and social services can be daunting. It is important to have an understanding of the implications of Goods and Services Tax (GST) and Fringe Benefits Tax (FBT) for vehicles used by employees for private purposes.

Maintaining accurate fleet record-keeping is an important part of managing tax obligations, including potential input tax credits and deductions for operating expenses such as fuel and maintenance. Additionally, some vehicles may qualify for tax concessions if used for charitable purposes. Clear fleet management policies play an important role in aligning with ATO guidelines. Consulting with tax professionals can provide tailored advice on tax classification and related obligations.



Product feature

## Fringe Benefits Tax Digital Logbook

Designed to streamline your operations, our Digital Logbook offers a simple, efficient solution for tracking and managing trips made by your drivers. Say goodbye to cumbersome paper Logbooks and embrace a smarter way to consolidate trip reporting and supporting fleet compliance.

# Vehicle condition and maintenance

A basic spreadsheet isn't sustainable when it comes to keeping track of fleet vehicle condition and maintenance for NFPs, NDIS service providers, and social services providers. With a large number of vehicles to manage, maintaining safety and meeting compliance obligations may become challenging. Staying on top of maintenance schedules can help reduce safety risks, but juggling all that information can be difficult long term. Keeping detailed records of repairs and inspections supports accountability during audits. Plus, coordinating maintenance across different locations means you need robust communication processes. Budget constraints can make timely maintenance tough, which can increase risk for vehicles (and your organisation's reputation).

## Solution

Interleasing's [Fleet Inspect](#) provides 360-degree visibility into driver allocated and pool vehicles, making paper forms, inaccuracies and lack of accountability a thing of the past. Fleet Inspect provides a simple dashboard and access to detailed vehicle inspection reports with date and time stamped photos, providing visibility into vehicle condition and maintenance at any point in time. In addition, an auditing schedule can be established, promoting drivers to complete inspections regularly, all from a single app.



Product feature

## Fleet Inspect

When a vehicle comes to the end of its lease, unreported damage is an unwelcome surprise to any fleet manager. Fleet Inspect delivers visibility into the condition of both driver allocated and pool vehicles throughout the lease lifecycle – so there are no surprises, just peace of mind.

# Grey Fleet

“Grey fleet” refers to vehicles that are not owned by an organisation but are used by employees for work purposes, often including personal cars.

For non-profit organisations, NDIS service providers, and social services providers, managing a grey fleet presents compliance challenges. One primary consideration is whether these vehicles meet safety and insurance standards, as organisations may face risks if incidents occur during work-related travel. Keeping track of whether employees and volunteers hold the necessary insurance and valid licenses can be a complex task, especially when dealing with a large number of people.

Additionally, there's the challenge of maintaining accurate records of vehicle usage, which supports accountability and demonstrates compliance during audits. Without proper tracking, it can be difficult to monitor how often these vehicles are used for work, which may result in gaps in reporting and oversight. This can increase the risk of regulatory issues and may impact safety.

## Solution

Part of Interleasing's [Driver Manager](#) fleet compliance solution, Grey Fleet assists with WHS/OHS compliance for staff who drive privately owned vehicles for work purposes. Grey fleet driver profiles are created to capture crucial vehicle details such as vehicle make, model, age, ANCAP rating, historic service, maintenance, tyre and insurance records.



Product feature

## Driver Manager

Ensuring your workforce is compliant can be time-consuming. Help keep your fleet compliant and drivers safe with Interleasing's Driver Manager – a simple platform to collect, monitor and share important driver and vehicle information.

# Fleet Policy

A comprehensive and effective fleet policy can provide an organisation with strategic guidance on four key elements of fleet risk; financial risk, reputational risk, human resource risk and legal risk. When your fleet risk objectives and strategies are formally recorded in a fleet policy, the policy becomes the reference point for all fleet-related decisions.

Fleet Policies typically outline how an organisation manages various aspects of fleet safety and compliance, including:

- vehicle suitability, maintenance and condition;
- accident management and reporting;
- driver assessment, licence checking, and declarations;
- grey fleet management; driver health and fatigue prevention; alcohol and drugs;
- use of mobile devices; journey planning;
- and defining and recording roles and responsibilities for work-related road safety, along with clear lines of communication and reporting.

However, organisations may find it challenging to dedicate the time to manage and resources needed to manage and track every crucial detail, which is where Interleasing can add value.

## Product feature

Interleasing Fleet Policy Assessment ensures your organisation's fleet policy is rigorous and robust enough to manage these key risks and optimise fleet performance can be made easier with the right partner. As a trusted adviser, Interleasing can review and refine each organisation's fleet policy to reflect the systems, processes and authorisations that will streamline the management of the fleet. The review takes into consideration the outcomes of Interleasing's fit-for-purpose and whole-of-life analysis which is intended to significantly reduce the administrative burden to program stakeholders.

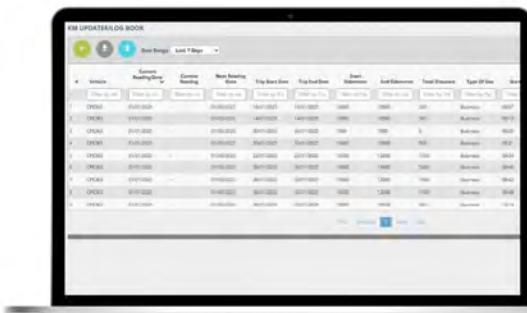
A policy that is fit-for-purpose will reduce exposure to certain risks, such as expensive KM reimbursements claims from untracked grey fleet, which can be a surprise expense. To counter this, a policy might direct workers to use pool vehicles (managed through Interleasing's [Pool Book](#)) as a more manageable alternative to grey fleet.



# Grey Fleet Emissions

Tracking and reporting on fleet emissions presents another challenge for the sector. The key difficulty is collecting accurate data, especially when managing a diverse range of vehicles with different fuel types. Implementing the necessary monitoring technology can be costly and logistically complex. Furthermore, staying informed about evolving emissions regulations at the local, state, and federal levels is important to support compliance.

Accurate reporting is important to assist with meeting legal requirements and for demonstrating a commitment to sustainability. However, the resources and time needed for effective data tracking and analysis can be overwhelming, particularly for organisations with limited budgets and staff. Establishing efficient tracking systems and clear reporting processes will help address these challenges.



The screenshot shows a software application window titled 'Emissions Logbook'. The interface includes a top navigation bar with buttons for 'Home', 'Logout', and 'Logout & Logout'. Below the navigation is a table with the following columns: #, Vehicle, Current Location, Current Date, Next Location, Next Date, Trip Start Date, Trip End Date, Start, End, Total Distance, Total Emissions, and Type of Use. The table contains 10 rows of data, each representing a trip record for a vehicle.

## Product feature

### Interleasing's Emissions Logbook

Empower your business with sustainable practices. Our Logbook provides a comprehensive solution for tracking and reporting on Grey Fleet carbon emissions, helping your business move towards a greener future. Designed to align with ASRS reporting requirements, assisting better compliance outcomes with ease. In addition, the logbook assists with broader Grey Fleet tracking to align with your Fleet Policy and OHS requirements.

# Driver Assessment, Licensing and Training

Your people are the beating heart of the social and community services sector. However, the human factor also presents the greatest risk, particularly when it comes to driver assessment, licensing, and behaviour. Ensuring that all drivers are properly assessed and licensed is critical for maintaining safety and compliance. Organisations must track valid driver's licenses, fitness to drive, and conduct regular driving assessments to ensure competency. Additionally, monitoring driver behaviour, such as adherence to road safety regulations and policies on alcohol and drug use, is essential to mitigate risks. This involves keeping detailed records of incidents, accidents, and any training received, as well as implementing regular reviews to ensure ongoing compliance.

## Policy review

Upload and store all policies to Driver Manager for convenient access to compliance documents. Drivers can easily view and accept policies, whilst fleet managers can identify any non-compliant drivers and vehicles, including grey fleet. This module scores safety-related policy content against the integrated best practice tool, testing for evidence of over 100 elements across 13 different safety categories. In addition, the system has the ability to send reminders to drivers to 'read and acknowledge' relevant policy documentation.

## Fines and infringements

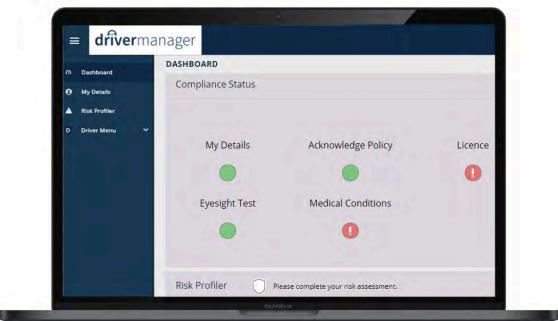
Securely stores details of a driver's current infringement demerit points (i.e. those not older than three years). The system has the ability to set agreed 'point thresholds' and send an alert directly to the driver and fleet manager, when the threshold has been exceeded.

## Drivers licence

Holds all drivers' Australian and International vehicle licence details including licence number, expiry date and any licence restrictions or conditions. The system can store multiple licences on one driver record and sends reminders to drivers and nominated personnel of approaching renewal dates.

## Medical conditions

Drivers are required to complete a health declaration relating to their 'fitness to drive' and any specific medical or licence conditions (e.g. eyesight tests). Information is updated annually, or in accordance with expiration of renewal dates in the system.



Product feature

## Driver Manager

Ensuring your workforce is compliant can be time-consuming.

Help keep your fleet compliant and drivers safe with Interleasing's Driver Manager – a simple platform to collect, monitor and share important driver and vehicle information.



## Testimonial

# Doing More With Less at Novita

### DIRECTING CAPITAL AND CASH

Based in South Australia, Novita has an 80-year history of supporting people with disabilities. Following the introduction of the NDIS, they needed to stay competitive by providing staff with the resources they need in order to continue to provide high quality service in an efficient manner. With a significant amount of capital tied up in their fleet, Novita saw an opportunity to convert these assets into cash flow and improve the overall quality and efficiency of their transport solution. Working to a tight time frame, Interleasing carried out an audit of 80% of Novita's inventory and arranged to buy and lease back more than 56 vehicles, providing a swift injection of cash flow.

Outsourcing the whole fleet management function to Interleasing delivered further cost savings and allowed Novita's team members to spend more time on core activities. "We wanted to outsource fleet management, mainly because it was more efficient than managing internally," says Jonathon Grant Chief Financial Officer with Novita. "Plus we could get more data, reporting and access to better pricing. The deal was so good it made no sense to continue to own and manage our own fleet". In addition to overall cost savings, the Interleasing partnership has helped Novita introduce new policy measures to improve fleet safety and quality standards. Regular vehicle upgrades, maintenance and servicing are all taken care of by Interleasing, ensuring Novita benefits from an expert approach to pricing, fleet efficiency and risk-management.



**55+ Vehicles purchased**



**Competitive & transparent pricing**



**Vehicle replacement cycle established**



**Vehicle upgrades to enable group transport capability**



**Fleet managed to best-practice standards**



**Comprehensive usage reporting & analysis**

### Testimonials

“Interleasing understood what we were trying to achieve, our timeframes and effectively provided a solution that ticked every box – and gave us no other option than to select them.”

Jonathon Grant - CFO, Novita



## Speak to the experts

Managing all aspects of fleet risk can feel complex, but it doesn't have to be. At Interleasing, we can support you with the development of a tailored fleet strategy that could lower costs, reduce administration and improve your fleet's performance. Get in touch with us today.

### **Book a demo to explore ways you can support fleet compliance today**

Try a demo today to see how these innovations can help streamline your processes and support your organisation's mission in making a positive impact.

## OPTIONAL INCLUSION

Under tax classification:

Here is a snapshot of the regulatory landscape you are expected to be across:

Income Tax Assessment Act 1997

- Governs the taxation of income for NFPs and outlines exemptions.

Goods and Services Tax Act 1999

- Deals with GST implications for NFPs and service providers, including vehicle purchases and operational costs.

Fringe Benefits Tax Assessment Act 1986

- Relevant for taxation of fringe benefits provided to employees, including vehicles.

Taxation Administration Act 1953

- Covers the administration of tax laws and the obligations of NFPs regarding tax compliance.

Corporations Act 2001

- Relevant for incorporated NFPs and their compliance obligations.

National Disability Insurance Scheme Act 2013

- Governs the NDIS and may have implications for service providers regarding vehicle use.

State and Territory Legislation

- Various state laws may apply to vehicle registration, road use, and local taxes.

Australian Charities and Not-for-profits Commission

Act 2012

- Outlines governance and financial reporting requirements for NFPs.

Environmental Protection Laws



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