

# Shipper Partner FLEET Tool: Getting Started Guide

## *Part I*





# Shipper Partner FLEET Tool: Getting Started Guide

## *Part I*

Transportation and Climate Division  
Office of Transportation and Air Quality  
U.S. Environmental Protection Agency



Office of Transportation and Air Quality  
EPA-420-B-12-002  
January 2012

---

## Introduction to Part I: GETTING STARTED GUIDE

---

This guide is **Part 1 of a three part series** to help shipper companies participate in the SmartWay Transport Partnership.

**In this guide you will learn about:**

- 1) Basic Information about SmartWay;
- 2) Joining SmartWay Transport Partnership as a shipper company;
- 3) Understanding the details of the SmartWay partnership agreement; and
- 4) Meeting software/hardware requirements for participating in the program.

**Please review this guide carefully BEFORE attempting to gather your company data, or enter data into the Shipper Partner FLEET tool or enter data.** Understanding the basics of the program, reviewing the Partnership Agreement and making sure your company/companies fit the criteria for joining SmartWay as a shipper partner will save a great deal of time and simplify your joining process.

**If you wish to explore the data requirements for shipper partners, please review “Part 2: Data Collection Overview and Workbook.”**

**If you wish to explore the Shipper Partner FLEET tool in preparation for joining the program, please review “Part 3: Data Entry Guide” and return to this workbook to prepare for gathering your data.**

---

## 1. Basic Information about SmartWay

---

Launched in 2004, SmartWay® is a United States Environmental Protection Agency (EPA) program that reduces transportation-related emissions and costs by creating incentives to improve supply chain fuel efficiency.

SmartWay is comprised of five components:

- **SmartWay Transport Partnership:** A partnership in which freight companies join and commit to benchmark operations, track fuel consumption and improve performance annually.
- **SmartWay Technology Program:** A testing, verification, and designation program to help freight companies identify equipment, technologies and strategies that save fuel and lower emissions.
- **SmartWay Finance Program:** A competitive grant program that makes investing in fuel-saving equipment easier for freight carriers.
- **SmartWay International Interests:** Guidance and resources for countries seeking to develop freight sustainability programs modeled after SmartWay.
- **SmartWay Vehicles:** A program that ranks light-duty cars and small trucks and identifies very high performers with the SmartWay logo.

### About the Partnership

The SmartWay Transport Partnership is a public/private collaboration between the EPA and the freight industry to improve fuel efficiency, increase environmental performance, and encourage supply chain sustainability.

### How the SmartWay Transport Partnership Works

Five types of freight transport companies can join SmartWay:

- Freight shippers
- Logistics companies (including 3PLs/4PLs<sup>1</sup>)
- Truck carriers
- Rail carriers
- Multi-modal carriers

Participating companies:

- assess freight operations,
- calculate fuel consumption and carbon footprint, and
- track fuel-efficiency and emission reductions annually.

SmartWay ranks partners' performance and recognizes superior performance with access to the SmartWay Partner logo.

---

<sup>1</sup> 3PLs/4PLs Third party logistics/fourth party logistics companies.

---

## 2. Joining the SmartWay Transport Partnership as a Shipper Company

---

Shipper companies that join the SmartWay Transport Partnership are known as “SmartWay Shipper Partners.”

Participation in SmartWay helps SmartWay Shipper Partners:

- identify opportunities to improve efficiency;
- demonstrate efficiency to potential customers; and
- reduce fuel/operations costs.

All SmartWay Shipper Partners agree to complete and submit the SmartWay Shipper Partner Fleet Efficiency and Emissions Tracking System (Shipper Partner FLEET) tool to:

- define company composition;
- characterize company activity;
- individually benchmark multiple companies; and
- track annual changes in performance.

SmartWay Shipper Partners also agree to follow the guidelines in the Shipper Partnership Agreement. A copy of the agreement is included in this document on page 5 and is also included in the Shipper Partner FLEET tool.

Upon approval of a Shipper Partner FLEET tool submission, shipper companies will be identified as SmartWay Shipper Partners on EPA’s website on the “SmartWay Partner List” and in a database used to identify companies that meet SmartWay’s annual requirements.

Before you can join SmartWay as a SmartWay Shipper Partner, you will need to:

1. Review the SmartWay Shipper Partnership Agreement; and
2. Review the software and hardware requirements to use the SmartWay Shipper Partner FLEET Tool.

---

### 3. Reviewing the SmartWay Carrier Partnership Agreement

---

To join the SmartWay Transport Partnership as a shipper company, you must agree to the language on the “Partnership Agreement for Shippers.” When you begin working within the tool, you will be asked to check a box stating that you agree to the terms of the partnership agreement. **This agreement must be renewed annually.**

Please review this language with the appropriate personnel within your organization before completing or submitting a FLEET tool to EPA.

---

#### Partnership Agreement for Shippers

**With this agreement, your company joins EPA’s SmartWay Transport Partnership and commits to:**

1. Measure and report to EPA on an annual basis the emissions performance of your company using EPA's SmartWay tool. (Existing companies must report the 12 months of data for the prior year ending December 31. Newly formed companies require a minimum of 3 months of operational data.)
2. Have performance results posted on the EPA SmartWay website/database.
3. Agree to submit supporting documentation to EPA for any data used to complete this tool and agree to EPA audit of this data upon request by EPA.

**In return, EPA commits to:**

1. Promote company participation in the Partnership by posting Partner names on the EPA SmartWay Website and in related educational, promotional, and media materials. EPA will obtain express written consent from the Partner before using the Partner’s name other than in the context of increasing public awareness of its participation as described here.
2. Provide companies with industry-wide performance benchmark data as this data becomes available to EPA.<sup>2</sup>
3. Assist Partners in achieving emission and fuel usage reduction goals (subject to Federal Government Appropriations).

#### General Terms

1. If the Partner or EPA defaults upon this agreement at any point, the agreement shall be considered null and void.
2. Either party can terminate the agreement at any time without prior notification or penalties or any further obligation.
3. EPA agrees not to comment publicly regarding the withdrawal of specific partners.
4. EPA reserves the right to suspend or revoke Partner status for any Partner that fails to accomplish the specific actions to which it committed in the SmartWay Transport Partnership Agreement and subsequent Agreements.
5. The Partner agrees that it will not claim or imply that its participation in the SmartWay Transport Partnership constitutes EPA approval or endorsement of anything other than the Partner’s commitment to the program. The Partner will not make statements or imply that EPA endorses the purchase or sale of the Partner’s products and services or the views of the organization
6. Submittal of this SmartWay Tool constitutes agreement to all terms in this Partnership Agreement. No separate agreement need be submitted.

---

<sup>2</sup> Individual corporate data will be treated as confidential business information.

---

## 4. Reviewing the Software and Hardware Requirements to Use the SmartWay Shipper Partner FLEET Tool

---

The SmartWay Shipper Partner FLEET tool is designed in Microsoft Excel Forms and requires the following software and hardware:

- A 2003 or later version of Microsoft Excel
- Excel security level set at Medium or lower
- A PC running Windows XP or newer operating system, or a Mac that is running the Windows XP operating system. The tool does not currently work using the Mac operating system
- A minimum of 5 megabytes of free disk space. More disk space may be required based on the number of companies you define in your tool
- Adequate memory (RAM) to run Microsoft Office
- A monitor resolution of at least 1,024 x 768<sup>3</sup>

Please check the user's guides for your computer, online support, or your company's IT department to make sure your system is set up to use the Shipper Partner FLEET Tool.

We encourage you to make sure that your virus software is up to date, and scan your PC before putting data in the Shipper Partner FLEET Tool.

---

<sup>3</sup> The tool will also work at 800 x 600 resolution, but many of the screens will appear with scroll bars.

---

## 5. Next Steps

---

Now that you understand the basics of the SmartWay program and the SmartWay Shipper Partner's role in the program and understand the software and hardware required to participate, it's time to start gathering data about each of your company/companies.

If you are ready to characterize your shipping companies, please visit <http://www.epa.gov/smartway/partnership/shippers.htm> to download Part 2- Shipper Partner FLEET Data Collection Overview and Workbook.