



OSHAcademyTM
Occupational Safety & Health Training

Fleet Safety Management

Every company that operates a fleet of vehicles needs to develop and implement a Fleet Safety Plan. This course introduces you to the various components of a Fleet Safety Program and offers suggestions on how to manage it effectively. By developing and maintaining an effective fleet safety program, you will be empowered to save lives, reduce risks of life-altering injuries, protect your organization's human and financial resources, and protect yourself against liabilities.

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OSHAcademy Course 719 Study Guide

Fleet Safety Management

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Contact OSHAcademy to arrange for use as a training document.

This study guide is designed to be reviewed off-line as a tool for preparation to successfully complete OSHAcademy Course 719.

Read each module, answer the quiz questions, and submit the quiz questions online through the course webpage. You can print the post-quiz response screen which will contain the correct answers to the questions.

The final exam will consist of questions developed from the course content and module quizzes.

We hope you enjoy the course and if you have any questions, feel free to email or call:

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Course Introduction

Motor Vehicle-Related Incidents: The Leading Cause of Occupational Fatalities

The U.S. Department of Transportation's National Highway Traffic Safety Administration (NHTSA) announced that 2017 highway fatality numbers were down following two consecutive years of large increases. But, the tragic news is that 37,133 people lost their lives in motor vehicle crashes that year. You can see a breakdown of traffic accidents on [OSHA's Accident Search Results](#) page.

Workers who use motor vehicles in performing their jobs are spread across numerous occupations. These include workers who operate vehicles owned or leased by their employer, and those who drive personal vehicles for work purposes.

Does your organization need a Fleet Safety Plan?

To answer that question, answer the following:

- Do we operate vehicles for work?
- Do our employees drive for work purposes?
- Does our staff drive our vehicles for private purposes?
- Do we provide employees with personal vehicles?
- Do employees or others drive on our premises?
- Do we employ contract transport services?

If the answer is 'yes' to any of the above the employer is responsible for ensuring appropriate fleet safety systems and controls are in place and that they are operating effectively.

Module 1: The Big Picture

Why should a company have a Fleet Safety Plan?

Motor vehicle crashes are a leading cause of death and injury for all ages. Crashes on and off the job have far-reaching financial and psychological effects on employees, their coworkers and families, and their employers.

You need a Fleet Safety program:

- To save lives and to reduce the risk of life-altering injuries within your workforce.
- To protect your organization's human and financial resources.
- To guard against potential company and personal liabilities associated with crashes involving employees driving on company business.

Every accident hurts employees and the company

Accidents are more expensive than most people realize because of the hidden costs. The more accidents that occur in a workplace, the higher the costs — both in direct costs paid by insurance premiums and greater uninsurable indirect costs.

Typically, companies will suffer from the more numerous indirect costs that are not usually covered by any insurance. In fact, studies show that the ratio of indirect costs to direct costs varies widely, but may be as high as 20:1. The magnitude of indirect costs is inversely related to the seriousness of the injury. The less serious the injury the higher the ratio of indirect costs to direct costs.

Below are examples of direct and indirect costs of accidents in the workplace:

Direct costs (insurable)

- workers compensation costs
- legal insurance costs
- vehicle insurance costs

Indirect costs (uninsurable)

- Any wages paid to injured workers for absences not covered by workers' compensation;

- The wage costs related to time lost through work stoppage associated with the worker injury;
- The overtime costs necessitated by the injury;
- Administrative time spent by supervisors, safety personnel, and clerical workers after an injury;
- Training costs for a replacement worker;
- Lost productivity related to work rescheduling, new employee learning curves, and accommodation of injured employees;
- Clean-up, repair, and replacement costs of damaged material, machinery, and property.
- The costs of OSHA fines and any associated legal action;
- Third-party liability and legal costs;
- Worker pain and suffering; and
- Loss of good will from bad publicity that may result in loss of business.

As you can see, there are many possible indirect costs associated with each accident. Every accident prevented represents potentially huge savings to the company.

The costs of a vehicle accident

The worksheet below, developed by OSHA, NETS and NHTSA, will help employers understand the impact of motor vehicle crashes. Accident costs are classified as direct and indirect. Direct costs are usually covered by insurance while indirect costs are uninsured. You can use the worksheet to illustrate the cost of one crash, or you can apply it to all crashes experienced in a chosen time frame within the organization.

<i>Costs of Motor Vehicle Crashes to Employers Worksheet</i>	
Direct Costs to the Organization	
Workers' compensation benefits	\$ _____
Healthcare costs	\$ _____
Increases in medical insurance premiums	\$ _____
Auto insurance and liability claims and settlements	\$ _____
Physical and vocational rehabilitation costs	\$ _____
Life insurance and survivor benefits	\$ _____
Group health insurance dependent coverage	\$ _____
Property damage (equipment, products, etc.)	\$ _____
Motor vehicle repair and replacement	\$ _____
EMS costs (ambulance or medivac helicopter)	\$ _____
Vehicle towing, impoundment and inspection fees	\$ _____
Municipality or utility fees for damage to roads, signs or poles	\$ _____
 Direct total	 \$ _____
Indirect Costs	
Supervisor's time (rescheduling, making special arrangements)	\$ _____
Fleet manager's time to coordinate vehicle repair/replacement	\$ _____
Reassignment of personnel to cover for missing employees	\$ _____
Overtime pay	\$ _____
Employee replacement	\$ _____
Re-entry and retraining of injured employees	\$ _____
Administrative costs (documentation, crash investigation)	\$ _____
Inspection costs	\$ _____
Failure to meet business goals resulting in loss of business	\$ _____
Bad publicity, loss of business	\$ _____
 Indirect Total	 \$ _____
 TOTAL	 \$ _____

Mission and Elements of the Fleet Safety Plan

Mission: Your program should work to keep the driver and those with whom he/she shares the road safe. And, if necessary, the program must work to change driver attitudes, improve behavior, and increase skills to build a “be safe” culture. To do that it's important to educate

the driver to improve attitudes. Improved attitudes will influence decision-making, behaviors, and ultimately driver performance.

Elements: By instructing your employees in basic safe driving practices and then rewarding safety-conscious behavior, you can help your employees and their families avoid tragedy.

Your Fleet Safety Program should at least include the following elements:

- Written policy
- Program administration (roles and responsibilities)
- Driver selection, authorization, and review
- Driver training
- Driver incentives and recognition
- Driver discipline
- Drug and alcohol testing
- Emergency equipment
- Vehicle inspection and maintenance
- Accident reporting and investigation
- Recordkeeping

Ten Action Steps to a World-Class Fleet Safety

The following 10 Action Steps, originally developed by the Network of Employers for Traffic Safety (NETS), will help you improve your fleet safety performance and minimize the risk of fleet motor vehicle crashes. Following these steps helps to ensure that you hire capable drivers, only allow eligible drivers to drive on company business, train them, supervise them, and maintain company vehicles properly.

Although the term "steps" implies that you climb one step at a time, I recommend working on each of these steps in parallel. Think about developing a team to work on these steps.

1. Develop ways senior management can demonstrate commitment & employees can get involved
2. Develop written fleet safety management policies and procedures
3. Develop and insist on the use of driver agreements
4. Complete Motor Vehicle Record (MVR) checks
5. Report crashes and make sure they are effectively investigated
6. Make sure vehicles are properly selected for the job, that preventive/corrective maintenance is performed, and that inspections are regularly conducted.
7. Institute a fair and objective disciplinary action system
8. Recognize and reward professional performance, and offer incentives for sustained professionalism.
9. Conduct effective safety meetings, driver training, and communications systems.
10. Work with regulatory agencies to ensure the regulatory compliance is achieved.

What can employers do?

Unlike other workplaces, the roadway is not a closed environment. Preventing work-related roadway crashes requires strategies that combine traffic safety principles and sound safety management practices. Although employers cannot control roadway conditions, they can promote safe driving behavior by providing safety information to workers and by setting and enforcing driver safety policies. Crashes are not an unavoidable part of doing business. Employers can take steps to protect their employees and their companies.

Policies

- Assign a key member of the management team responsibility and authority to set and enforce a comprehensive driver safety policy.
- Enforce mandatory seat belt use
- Do not require workers to drive irregular hours or far beyond their normal working hours

- Do not require workers to conduct business on a cell phone while driving
- Develop work schedules that allow employees to obey speed limits and to follow applicable hours of service regulations

Fleet Management

- Adopt a structured vehicle maintenance program.
- Provide company vehicles that offer the highest possible levels of occupant protection.

Safety Programs

- Teach workers strategies for recognizing and managing driver fatigue and in-vehicle distractions.
- Provide training to workers operating specialized motor vehicles or equipment.
- Emphasize to workers the need to follow safe driving practices on and off the job.

Driver Performance

- Ensure that workers assigned to drive on the job have a valid driver's license and one that is appropriate for the type of vehicle to be driven.
- Check driving records of prospective employees, and perform periodic rechecks after hiring.
- Maintain complete and accurate records of workers driving performance.

Source: [NIOSH 2004-136: Work-related Roadway Crashes Prevention Strategies for Employers](#)

We will be covering all of these topics in the upcoming modules of the course.

Module 1 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

- 1. Motor vehicle crashes are a leading cause of death and injury for _____.**
 - a. those 18 and younger
 - b. women 25 and older
 - c. all those under 30
 - d. all ages

- 2. Bad publicity and loss of business are examples of _____ of a vehicle accident.**
 - a. direct costs
 - b. indirect costs
 - c. natural costs
 - d. systemic costs

- 3. Which of the following will influence decision-making, behaviors, and ultimately driver performance?**
 - a. cheap fuel
 - b. improved attitudes
 - c. threat of discipline
 - d. incentives

- 4. A Fleet Safety Program should include all the following elements EXCEPT _____.**
 - a. written policy
 - b. driver discipline
 - c. driver selection, authorization, and review
 - d. avoiding OSHA inspections

5. Which of the actions should be conducted in conjunction with a fair and objective disciplinary action system?

- a. Recognition of professional performance
- b. Incentives for sustained performance
- c. Rewards for excellence
- d. all the above

Module 2: Duties and Responsibilities

Management Responsibilities

Managers play a very important role in the Fleet Safety Program, and should take on the following responsibilities:

- Develop and implement general Fleet Safety Program policies and procedures.
- Assume responsibility for the driving record of employees while they are on duty.
- Frequently check for compliance of established Fleet Safety Program requirements and policies.
- Personally, review the decisions on accidents and take all steps necessary to prevent a recurrence.
- Insist that all assigned vehicles are maintained adequately for safe operation.
- Establish policies for the periodic inspection of assigned vehicles for safety discrepancies, malfunctions, signs of abuse, unreported damage and cleanliness. Have repairs made as soon as possible.
- Fully support the company's driver training program to promote defensive driving.
- Review each preventable vehicle accident and unsafe driving report with the employee and his supervisor to emphasize management's intolerance of irresponsibility behind the wheel.

- Establish an aggressive campaign to enforce the wearing of seat belts on all trips.

Supervisor Responsibilities

Front line supervisors are key in making sure the Fleet Safety Program is successful. They ensure the success of daily operation by fulfilling the following responsibilities:

- Ensure that employees do not drive any company vehicle unless they have a VALID Drivers' License and are familiar with company driving rules and regulations.
- Insure that only authorized personnel be allowed to operate company vehicles, special purpose vehicles, and trucks.
- Must be alert in observing unsafe practice of employees and insure that action is taken immediately to correct the driver.
- Review all preventable vehicle collisions with employees and discuss each unsafe act that was responsible.
- Periodically ride with the vehicle and truck drivers to check for compliance with operating instructions and traffic regulations.
- Make sure unsafe vehicles are not driven until safety discrepancies have been corrected.
- Fully utilize the decisions and recommendations handed down by the Safety/loss Control Committee.



Operator Responsibilities

Employees who drive company vehicles are, of course, critical to the successful operation of fleet vehicles. They are responsible for following all of the guidelines set forth in the Fleet Safety Program. These responsibilities include:

- Safe operation of vehicles for the safety of passengers and cargo
- Having a valid driver's license in their possession
- Inspecting the vehicle which they are about to drive, in accordance with established policies

- Reporting any vehicle accidents

Sample Vehicle Operator's Handbook

Safety Manager Responsibilities

The Safety Manager plays a very important role in helping managers, supervisors, and drivers make sure the fleet safety program is effective. He or she is usually in charge of developing the policies the Fleet Safety Program. Typical responsibilities will include:

- Assist top management in the implementation of the Fleet Safety Program.
- Assist in monitoring the driving experience of employees who operate company vehicles.
- Develop and implement an effective fleet safety education and training program.
- Monitor to ensure proper maintenance procedures are being followed to keep vehicles in a safe operating condition.
- Verify that adequate insurance limits are maintained by drivers who use their personal vehicle for company business.

Module 2 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

- 1. Assuming responsibility for the driving record of employees while they are on duty is assigned to ____.**
 - a. employees
 - b. supervisors
 - c. managers
 - d. safety staff

- 2. This person is responsible for reviewing all preventable vehicle collisions with employees and discussing any unsafe acts that may have contributed to the accident.**
 - a. Employee
 - b. Supervisor
 - c. Manager
 - d. Safety staff

- 3. It is the job of this person to establish policies for the periodic inspection of assigned vehicles.**
 - a. Employee
 - b. Supervisor
 - c. Manager
 - d. Safety officer

- 4. Who should be responsible for periodically riding with drivers to check for compliance with operating instructions and traffic regulations?**
 - a. supervisors
 - b. safety committee members
 - c. co-workers
 - d. safety managers

5. Which of the following is one of the 10 action steps to improve fleet safety performance?

- a. Randomly assign vehicles to drivers
- b. Encourage senior management to get out on the road
- c. Make sure crash investigation always result in discipline
- d. Institute a fair and objective disciplinary action system

Module 3: Operator Responsibilities

Inspections

The vehicle operator is responsible for checking the safety and general condition of the vehicle, including gas, oil, and other fluid levels, lights, and brakes.

With the assistance of the Safety Manager, supervisors should provide inspection checklist to vehicle operators. To formally document that training has been accomplished and that drivers understand their responsibilities, they should sign an acknowledgement form that looks something like this:

Sample Vehicle Maintenance Acknowledgement Form

I have received the proper training in daily vehicle inspection procedures. I understand that it is my responsibility to inspect all fluid levels, lights, tires, and safety equipment each day before I use the vehicle. I understand that it is my responsibility to report any and all vehicle defects and safety concerns. If there is something wrong with the vehicle, which may affect safety, I will not drive the vehicle until adequate repairs are completed. I also understand that it is my responsibility observe all policies and procedures concerning the proper and safe operation of a company vehicle.

Driver Name (Print)

Driver Signature

Date

Supervisor Signature

Date

Unauthorized Use of Vehicles

Make sure your company vehicles are to be used for company business only. Persons found using company vehicles for their personal errands should be subject to disciplinary action unless your company's policy allows short side trips for meals, etc.

Operation and Occupancy of company Vehicle by Unauthorized Persons

Employees should not permit unauthorized employees or non-employees to ride in company vehicles, except when such persons are conveyed in the performance of duty, or authorized to ride by supervisory staff.

Vehicle Abuse

Employees should not operate a vehicle or equipment:

- for any purpose for which it was not designed
- beyond its designed limits,
- in areas or locations for which it was not designed
- in a manner that may cause damage through neglect, misuse, improper driving techniques, or improper handling

Transporting Employees in Vehicles

Policies for transporting employees should be well thought-out.

- No more than three employees should ride in the front seat or cab of a vehicle
- Each position should be equipped with a seat belt
- Each person should use the seat belt provided
- Employees should not be authorized to ride or work from the bed or rear of a vehicle while it is in motion

Distracted Driving

According to the National Highway Traffic Safety Administration, distraction is anything that diverts the driver's attention from the primary tasks of navigating the vehicle and responding to critical events. Driver safety is impaired whenever these three types of distraction occur while driving:

1. **Visual distraction** - takes your eyes off the road. Examples include: looking at dashboard, reading a map, or looking for address.

2. **Cognitive distraction** - takes your mind off the road. Examples include: day dreaming, drowsiness, cell phone use, or moving animals.
3. **Manual distraction** - takes your hands off the wheel. Examples include: eating, drinking, smoking, or changing radio station.

So, when you think about tasks that can be a driving distraction, you can see that they often fit into more than one category: eating is visual and manual, whereas using a navigation system is all three.

There are two basic components of the distraction safety problem:

1. the attentional demands of the distracting task, and
2. the frequency with which drivers choose to multitask.

Task demands relate to the amount of resources (visual, cognitive, manual) required to perform the task. The other issue is exposure, which is how often drivers engage in the task. Putting those two concepts together, even an easy task can be a bigger safety problem if the person does the task 50% of their driving time.

You can use this NHTSA sample company [Distracted Driving Policy](#) to develop a policy for your company.

Transporting Equipment

Employees using company vehicles should exercise caution when transporting equipment, packages or other materials in the driver/passenger compartment that would become flying projectiles in the event of an accident.

- Items such as briefcases, laptop computers, tools, etc. should be transported in the trunk of passenger vehicles.
- Pickups, whether standard cab or extended, should have secured storage capabilities in the bed of the vehicle such as tool storage or camper shells if they are used with any regularity in the transport of items that could injure the driver or passenger(s) in the event of an accident.
- Vans used in the regular transport of such items should have screen type barriers between such cargo and the driver/passenger compartment.

- It is always important to keep the driver/passenger as free as possible of objects that could distract their attention or could cause from unexpected movement.

Traffic Laws

While driving commercial vehicles, drivers represent the company. Consequently, it's vitally important that drivers operate their vehicles in a courteous and professional manner.

- Drivers should adhere to all traffic laws and regulations when operating company vehicles.
- Drivers should at all times operate company vehicles in such a manner as to avoid injury to persons or damage to property.

Parking Vehicles

It's important that employees park company vehicles in a legal and proper manner.

- Employees should remove the keys and lock the vehicles, except when specifically instructed otherwise.
- Employees should not park on the wrong side of a street or highway, unless it is mandatory to park in such a location to perform a job.
- All signs, cones, lights, and warning devices as required by law should be used when vehicles are parked or in use in a public travel lane.
- Employees should use all safety brakes, lockout devices, and other parking safety methods when parking equipment.

Use of Personal Vehicles for Business

Supervisors should identify and authorize those employees who are required, as part of their normal job duties to use their personal vehicle to conduct company business.

If employees use their personal vehicles for business use, be certain they have sufficient liability coverage with their personal auto policies. For example, if an employee drives his or her own car to deliver an order for the business and is in an accident with another driver, his or her insurance company will pay the claim up to her policy limit.

But if the other driver sues the company for additional damages, a basic business owner's policy (BOP) won't suffice. Commercial vehicle insurance with an added non-owned auto liability endorsement could help protect the company's assets from an expensive lawsuit.

Module 3 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

1. To formally document that training has been accomplished and that drivers understand their responsibilities, each driver should _____.

- a. swear an oath of allegiance
- b. cross your heart and hope to die
- c. sign an acknowledgement form
- d. promise to be professional

2. Employees should not permit unauthorized employees or non-employees to ride in company vehicles, EXCEPT:

- a. when conveyed in the performance of duty
- b. when authorized to ride by the supervisor
- c. when it is convenient to do so
- d. a or b above

3. According to the text, employees may be allowed to ride or work from the bed or rear of a vehicle while it is in motion.

- a. True
- b. False

4. While driving commercial vehicles, drivers represent the company.

- a. True
- b. False

5. If employees use their personal vehicles for business use, be certain they have sufficient liability coverage.

- a. True
- b. False

Module 4: Driver Selection

Qualification Standards

Knowing the ability, experience and attitude of your drivers is a key factor in the selection process. An important area in this process is to establish qualification standards for new employees and existing employees who have driving duties. To enforce these standards, think about implementing the following driver qualification procedures.

Driver Age Requirements

All drivers must be a minimum of _____ years of age. (Enter age in compliance with your state(s) governmental requirements)

Application for Employment

All driver applicants should complete an application for employment. You should include a Driving Position Supplement containing all of the information required for positions in which driving is required.

Sample Application Form-Driver Supplement

Driver applicants should list all former employers for the past (your number) of years. Any gaps in employment for more than a period, as determined by your company, should be satisfactorily accounted for on the application.

Licensing

Your company should obtain a legible copy of the license of all driver applicants. A review of the license should be conducted to be certain it is valid, has not expired, and is the appropriate for the class of vehicles in which driving is required.

Whenever driving company fleet vehicles or operating their personal vehicle for business purposes, employees should have in their possession a valid driver's license. Employees should notify their supervisor if their license is suspended, revoked, or expired.

Employees who drive vehicles, which require a Commercial Driver's License (CDL), should comply with the state Department of Motor Vehicles' requirements for medical examinations and license renewal.

Supervisors should maintain a system that insures all employees operating vehicles have the proper class of license and check licenses for current status at frequent intervals.

Motor Vehicle Record (MVR) Check and Evaluation

Your company should request a MVR for driver applicants being considered for employment in which driving company vehicles or operating their own vehicle for company business will be required. An MVR should be requested from every state the applicant has lived in during the past number years determined by your company.

The OSH Manager should review all MVR information to determine if driver applicant meets your company's qualification standards regarding driving records.

A formal review of the driver's MVR should be conducted on at least an annual basis to ensure that existing drivers are meeting the established qualification standards.

MVR's are personal and confidential and should only be discussed with the driver or other persons authorized to know. The safety or human resource manager should receive results of the MVR check and ensure any needed corrective action is applied in a timely manner.

Driver Qualification Standards

To ensure potential new and existing drivers meet your company's qualification standards for motor vehicle records as set forth in the Fleet Safety Plan, the following standards should be instituted:

1. Actions taken should be based on the number of points and violations shown from the MVR checks and evaluations
2. Standards and penalties should be enforced for drivers involved in preventable accidents.

You may want to establish a point structure system to evaluate potential new and current driver motor vehicle records. Here is an example of an effective point system.

Sample Point Structure System

Investigation of Previous Employment

Your company should contact all former and current employers of the driver applicant for at least the previous three years to verify as much of the following information as possible:

- Dates of employment
- Type of work performed

- Type of vehicle(s) operated
- Extent of driving experience
- Vehicle accident record
- Overall work history and performance

All former and current employer information gathered from the inquiries should be in writing and should be retained in the driver's (if hired) qualification file. In the event a former or current employer refuses to release information, a note stating this should be placed in the file.

The Safety Manager/HR Director should review all former and current employer information to determine if the driver applicant meets the hiring standards regarding past and current employment, and to determine if the applicant was truthful about information listed on the employment application.

Driver Performance

Your company should require all driver applicants who will require a Commercial Driver's License (CDL) for their driving position to successfully complete a road test examination prior to an offer of employment. Some companies waive this requirement if the employee will only be driving automobiles and mini vans and has a clean driving record.

The road test examination should be performed in the type of vehicle the driver will operate. The driver's performance should be monitored during the selection process as well as at periodic intervals throughout the driver's career using information obtained from motor vehicle records and file data.

Driver Qualification File

The driver selection process should include developing a driver qualification file. Elements of this file may include such items as:

- Employment Application
- Interview notes
- MVR checks
- Driver training information

- Driver evaluation and performance reviews

Module 4 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

1. A key area in the selection process is to _____ for new and existing employees.

- a. establish qualification standards
- b. determine general aptitudes
- c. rely on employee interviews
- d. depend on submitted resumes

2. Which of the following is a good reason to conduct a review of the driver applicant license?

- a. make certain it is valid
- b. check to see if it has expired
- c. ensure license is appropriate for class of vehicle
- d. each of the above is a good reason

3. A formal review of the driver's MVR should be conducted on at least _____ basis.

- a. a weekly
- b. a monthly
- c. a quarterly
- d. an annual

4. According to the text, all driver applicants who will require a Commercial Drivers License (CDL) should _____ prior to an offer of employment.

- a. complete a road test

- b. sign a pledge to drive safe
- c. pay a deposit to cover accidents
- d. complete a blood test

5. Which of the following is NOT listed as information necessary to verify the driver applicant's previous driving record?

- a. Dates of employment
- b. Types of vehicle(s) operated
- c. Vehicle insurance coverage
- d. Extent of driving experience

Module 5: Driver Training and Evaluation

General Requirements

It's important to have a process in place to hire only qualified and safe drivers. Once the new driver is hired, a responsible person should be assigned to accomplish initial training and retraining if required.

In order to keep drivers and supervisors well trained and informed, the company should institute a number of policies regarding driver training. These policies include:

- driver orientation
- formal training for entry-level drivers
- driver-finishing training for new hires
- driver refresher training for all drivers in the fleet
- remedial training for “problem drivers”
- periodic driver meetings
- driver performance evaluation and reviews

Driver Orientation

Your company should have an orientation program which all new drivers are required to complete. The orientation program consists of comprehensive classroom training that will cover a variety of subjects. Among the topics covered in driver orientation are:

- established driving policies and procedures
- regulatory compliance,
- vehicle maintenance and inspections
- accident reporting procedures
- [defensive driving procedures](#)
- [safe driving tips](#)

After successfully completing the classroom portion of the orientation, all new drivers should be assigned to a driver trainer. The purpose is to evaluate the new employee's overall driving skills and techniques, and to apply what has been learned in classroom to an actual job situation.

This time should also be used to familiarize the new driver with paperwork procedures relating to vehicle maintenance and inspections and to answer any questions or concerns that were not addressed in the classroom training.

Driver Meetings

At least monthly, a driver safety meeting should be conducted by driver supervisors. These meetings between supervisors and drivers are held to share news and information, and to give drivers a forum to discuss issues, questions, or concerns. All drivers are expected to participate in these meetings, and all driver input is welcomed and appreciated.

[Resources for Drivers](#)

Driver Evaluation and Performance Reviews

Driver supervisors should be responsible for conducting a periodic and structured performance review with each of their drivers at a minimum of every six months.

It is important for company drivers to understand that their performance will be evaluated on an on-going basis, and they may request, or their supervisor may recommend, a review at any time. However, all drivers should receive periodic structured reviews of their individual performance.

On-Road Performance Evaluation

The on-road evaluation is conducted by the driver supervisor to monitor the performance of current drivers by riding with them or following them. The supervisor should document the results and counsel drivers concerning problems or deficiencies that were observed. The supervisor should also remember to recognize excellent driver performance. This is the best way for the supervisor to ensure that the driver is following the proper vehicle inspection and defensive driving procedures.

The Performance Review

Driver performance reviews should be held in private and away from the operation area. The review is considered the driver's time and interruptions should not be allowed. The driver performance review should:

- measure the driver's actual results against established goals and standards of the company
- recognize the driver's contributions and accomplishments
- correct any new or existing performance problems
- establish goals or standards for the next review period
- review the driver's MVR

Once the driver and supervisor conclude their discussion of past performance; they should address any development, training, or corrective action needs; and have established new goals and standards for the future. At the conclusion of the meeting, the supervisor should:

1. Summarize the performance review discussion including all mutually agreed upon plans and goals
2. Provide an opportunity for the driver to react, ask questions, and give additional ideas and suggestions

3. Express appreciation for the driver's participation, time, and efforts
4. Document what was discussed, agreed upon, and corrective action/training plans

A copy of the written performance review and MVR check should be given to the driver, the supervisor's immediate manager, and the original placed in the driver's personnel file.

Module 5 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

1. According to the text, which of the following training policies is appropriate for "problem drivers"?

- a. discipline
- b. road testing
- c. remedial training
- d. initial training

2. Orientation program topics for new drivers include all of the following, EXCEPT:

- a. ANSI 129 conformance
- b. accident reporting procedures
- c. established policies and procedures
- d. safe driving tips

3. _____ are held to share news and information, and to give our drivers a forum to discuss issues, questions, or concerns?

- a. remedial training
- b. one-on-one reviews
- c. drivers meetings
- d. webinars

4. This is the best way for the supervisor to ensure that the driver knows and is following proper vehicle procedures and operation.

- a. written questionnaire

- b. one-on-one interview
- c. written exam
- d. road test

5. The driver performance review should measure the driver's actual results against _____.

- a. national statistics
- b. projected cognitive ability
- c. established company goals and standards
- d. all the above

Module 6: Vehicle Accident Investigations

Accident Investigation Policy

Your company should fully investigate any accident involving company personnel and vehicles. All accidents involving a company vehicle regardless of the severity should be reported immediately.

The investigation of minor accidents involving company property must be the responsibility of the driver and supervisor only.

The Safety Manager may be in charge of accident investigations in which serious property damage or death to an employee has occurred.

The Safety Manager may also be in charge of accident investigations in which a third party is involved. Management should initiate any other investigations deemed appropriate.

Accident Investigators

At the scene, the accident investigator will carefully survey the scene, take measurements, and note the position of any debris from the accident. The investigator will also take photos of the scene, with careful notes of what the photos depict. A sketch or map of the site will be drawn to scale, with any landmarks near the scene noted as to position.

See Course 702 for more information on accident investigation procedures.

Documenting the accident

The more accurate the information about the accident provided is, the easier it is to get at the root causes of the accident. It is important that the accident investigator(s) be as objective as possible in gathering and evaluating data from the accident scene.

[Another sample accident investigation report](#)

Supervisor's Accident Investigation Form

Name of Person Involved in Accident _____

Work Location _____

Driver's License Number _____ Vehicle Number _____

Address _____

City _____ State _____ Zip _____

(Circle one) Male Female

Date of Accident _____ Time of Accident _____

Exact location of accident:

Did the employee incur any injuries as part of the accident? If so, describe:

Was there any damage to the vehicle? If so, describe:

What caused the event?

Were citations issued? Yes _____ No _____ (include copy with report)

Recommended preventive action for the future to prevent recurrence:

Signature

Date

Driver Responsibility in Accident Investigation

Certain driver responsibilities must be carried out at the scene of an accident. The two main concerns at the scene of an accident are:

- to deal with immediate problems
- to gather and report pertinent accident information promptly

When the accident occurs

These two items can be broken down into a 6-step accident procedure for drivers to follow.

Step 1: Stop, stay calm

Step 2: Turn on your emergency flashers as an immediate warning signal. Then do a quick evaluation of accident victims, if any, and provide assistance. Next, set out emergency warning devices on the roadway.

Step 3: Either contact local law enforcement personnel and your supervisor yourself or arrange to have someone do it for you. Be courteous and cooperative when providing information to authorities. Never admit guilt or liability at the scene of an accident. Never leave the scene of an accident.

Step 4: Write down names, license numbers and other information regarding the accident and those people involved in it. Draw a simple diagram of the accident scene. The more detail you can provide, the better it will be for insurance and/or legal purposes later. If you have a camera for use at the accident scene, document the situation with photographs from various angles.

Step 5: After the vehicle has been secured, warning devices put in place, assistance rendered to injured person(s) (if any), and law enforcement personnel contacted, you (the driver) should communicate the accident to your supervisor.

Step 6: Complete Vehicle Accident Report Form at the scene of the accident.

Vehicle Accident Review

The Safety Manager should review all vehicle accidents to determine the true cause and whether it was preventable or non-preventable. A preventable collision is one in which the driver failed to do all that could be reasonably expected of them to avoid the collision.

The functions of the committee in reviewing vehicle collisions are as follows:

1. Convene as soon as possible after a collision involving a/an company vehicle to objectively consider the evidence presented. This evidence includes any information given by the driver, his or her supervisor and the police report of the accident. These same rules also apply to any employee officially authorized to drive his or her personal cars on official company business.
2. Determine the true cause of the collision and whether it was preventable or non-preventable.
3. Review the driver's past driving record.
4. Report in writing to Management the Safety Committee's findings, and the recommendations for corrective action.
5. In the case of a preventable ruling, schedule a personal one-to-one meeting with the driver to discuss the decision, possible remedial training, and/or possible disciplinary action. This meeting will be scheduled as soon as possible after the preventability determination has been made.

Module 6 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

- 1. All accidents involving a company vehicle regardless of _____ should be reported immediately.**
 - a. severity
 - b. probability
 - c. liability
 - d. responsibility

- 2. At the scene of an accident, the investigator will typically do which of the following?**
 - a. take photos
 - b. draw a map or sketch
 - c. take measurements
 - d. all the above

- 3. The more _____ the information about the accident provided is, the easier it is to get at _____.**
 - a. comprehensive, the surface causes
 - b. accurate, the root causes
 - c. timely, who caused the accident
 - d. organized, the corrective actions

- 4. A preventable collision is one in which the driver _____.**
 - a. failed to do all that could be reasonably expected

- b. failed to anticipate and act prior to the accident
- c. failed to predict and react to the accident
- d. failed to pay adequate attention to road conditions

Module 7: Vehicle Selection and Maintenance

Vehicle selection and assignment

It is important to ensure that the vehicles you select for a specific function are adequate in design and capability for the intended purpose.

It is the responsibility of each driver to select the appropriate vehicle to be used in performing their tasks. Make sure your employees keep all vehicles well maintained and in safe and efficient operating condition at all times.

For the latest information on crash test ratings and other important vehicle safety information, visit www.safercar.gov. To report a concern about a defect or problem with your vehicle, contact the NHTSA Auto Safety Hotline at: 1-888-DASH-2-DOT.

Where practical, consider adopting a “One Driver, One Vehicle” strategy. Assignment to a single vehicle instills a sense of responsibility and ownership. Also, a worker who operates the same vehicle each day may more easily identify potential mechanical problems with that vehicle.

Vehicle Maintenance Program

It is vitally important you implement a comprehensive vehicle maintenance program. Your fleet maintenance program should include:

1. pre-trip vehicle inspections for key potential problem areas,
2. immediate withdrawal from service for any vehicle with mechanical problems, and
3. periodic withdrawal from service for comprehensive inspection and scheduled maintenance

Federal motor carrier regulations under 49 CFR 396 contain a list of commercial motor vehicle systems and parts that must be inspected.

Preventive and corrective maintenance

A good preventive maintenance program lowers repair frequency and lowers overall maintenance cost. The service portion of Preventive Maintenance is actually scheduled maintenance.

Prior to requiring or permitting a driver to operate a vehicle, the employer must repair any defect or deficiency listed on the driver vehicle inspection report which would be likely to affect the safety of operation of the vehicle.

The employer should certify on the original driver vehicle inspection report that the identified defect or deficiency has been repaired or that repair is unnecessary before the vehicle is operated again.

The employer must maintain the original driver vehicle inspection report, the certification of repairs, and the certification of the driver's review for three months from the date the written report was prepared.

Driver vehicle inspection report(s)

You should require drivers to report on the condition of the vehicles they operate. Each driver should prepare a report in writing at the completion of each day's work on each vehicle operated. The report should cover at least the following parts and accessories:

- Service brakes including trailer brake connections
- Parking (hand) brake
- Steering mechanism
- Lighting devices and reflectors
- Tires
- Horn
- Windshield wipers
- Rear vision mirrors
- Coupling devices
- Wheels and rims
- Emergency equipment

Each report should identify the vehicle and list any defect or deficiency discovered by or reported to the driver which would affect the safety of operation of the vehicle or result in its mechanical breakdown.

If no defect or deficiency is discovered, the report should so indicate. The driver should sign the report. On two-driver operations, only one driver needs to sign the driver vehicle inspection report, provided both drivers agree as to the defects or deficiencies identified. If a driver operates more than one vehicle during the day, a report should be prepared for each vehicle operated.

Driver On-The-Road Inspections

Once on the road, the driver should examine any cargo and its load securing devices and make any necessary adjustments.

If a problem is found, the driver should notify his/her supervisor and either have the necessary repairs or adjustments made prior to operating the vehicle, or safely travel to the nearest repair facility.

Pre-trip Inspections

In the most effective Fleet Safety Programs, the company is committed to following a strong daily inspection program. All vehicles are inspected every day they are operated.

Each driver should be satisfied that his/her assigned vehicle is in proper working condition prior to operating. Each driver should also be satisfied that any cargo is properly distributed and secured.

The driver should also review the last completed Driver's Vehicle Inspection Report to verify that any needed repairs were made to the vehicle. If the defects noted were not acknowledged by an authorized signature, the driver should not drive the vehicle until the defects are handled appropriately.

When a driver reports safety related problems or vehicle damage, the vehicle inspection report should be submitted to his/her Supervisor. The Supervisor should sign the report indicating that repairs have been made (or are not required to be made). The original inspection report and certification of repairs should be retained in the Vehicle Maintenance File.

The original inspection reports on which no defects were noted and on which defects were noted, and the certification of repairs, will be retained in the Vehicle Maintenance File.

Vehicle Maintenance File

The employer should keep a complete record on each vehicle in the fleet. It should include basic vehicle information and information indicating the nature and due date of any inspection

and maintenance operations to be performed on the vehicle, and a record of any inspections, repairs and maintenance performed on the vehicle in question, including dates performed and specifics on the nature of the operations.

Make sure you maintain the following information for every vehicle you have for 30 days or more:

- Identifying information
- Schedule of inspections
- Records of tests conducted on buses with push-out windows, emergency doors and marking lights

When the vehicle breaks down

Driver's responsibilities when a breakdown happens include:

- Safely stopping and securing the vehicle and load
- Safely placing the warning devices
- Diagnosing and calling in the breakdown to his/her Supervisor

Supervisor responsibilities when a breakdown occurs include:

- Determining the nature of the breakdown and best course of action
- Locating, contacting, and dispatching a vendor to facilitate repairs
- Obtaining all vehicle repair records

Module 7 Quiz

Use this quiz to self-check your understanding of the module content. You can also go online and take this quiz within the module. The online quiz provides the correct answer once submitted.

- 1. The “one driver-one vehicle” strategy tends to instill in the driver a _____.**
 - a. sense of assignment
 - b. sense of responsibility and ownership
 - c. sense of appreciation
 - d. sense of devotion

- 2. Your fleet maintenance program should include which of the following policies?**
 - a. pre-trip vehicle inspections
 - b. immediate withdrawal for mechanical problems
 - c. periodic withdrawal for comprehensive inspections
 - d. all the above

- 3. According to the text, which of the following programs lowers repair frequency and overall maintenance cost?**
 - a. annual inspection
 - b. optimal servicing
 - c. preventive maintenance
 - d. corrective maintenance

- 4. What should a driver do upon realizing that the defects noted on the previous driver's Vehicle Inspection Report have not been acknowledged by an authorized signature?**
 - a. The operator need do nothing
 - b. The operator should report it after the trip
 - c. The operator should not drive the vehicle
 - d. The operator should issue demerits to the previous driver

- 5. According to the text, when a vehicle breaks down, who is responsible for locating, contacting, and dispatching a vendor for repair?**
- a.** operator
 - b.** supervisor
 - c.** line manager
 - d.** safety manager