

# **Fleet Vehicle & Driver Safety Management Manual**



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## **Introduction**

This publication is designed to assist fleet operators in controlling economic loss resulting from the improper operation and use of entity vehicles. Only the driver and vehicle aspects of fleet crash control are considered here. Industrial safety factors must be considered at the facility and personal injury protection to the driver is not included. Clear Risk Solutions is able to provide guidance in establishing a general safety program.

Because of the many different types of fleets with varying operations, it would be impossible to cover all aspects of a Motor Vehicle Fleet Accident Control Program in a short outline. Therefore, only areas, which are common to all fleets, are dealt with in this publication.

Without the full support and active participation of management, there is little chance the program will produce the desired results. Safe operations are just one of the important aspects in the overall control of the fleet, but nonetheless it plays a significant role in the success or failure of the operation. It requires the coordinated efforts of everyone in the organization to make it effective and constant evaluation to keep it effective.

## Best Practices for Fleet Management

### Vehicle Crashes: the No. 1 Cause of Workplace Fatalities

More people are fatally injured on the job due to vehicle crashes than any other single cause<sup>1</sup>. From 1995 – 1999, there were an average of 6,163 fatalities each year, of which 43% were vehicle related, including a variety of highway and moving crashes. The injury costs associated with employee vehicle crashes are generally three times the cost of other workplace injuries.

An effective fleet management program not only reduces your auto liability exposure, but also helps protect the safety and welfare of your employees. On-the-job injury reduction programs must include fleet safety in order to effectively cover all aspects of employee safety. This includes employees driving entity vehicles, as well as employees driving their personal vehicles for job-related business.

The purposes of a fleet management program are:

- Reduce Crashes
- Reduce Injuries
- Protect the Public
- Decrease Losses

To be effective, a fleet must be:

- **Reliable** – All trips must be completed as scheduled, without harm to passengers or cargo.
- **Safe** – Few, if any, crashes.
- **Efficient** – It must operate at an acceptable cost.
- **Lawful** – The fleet must not incur liabilities, either for crashes or for violating civil/criminal laws, for either the owner of the fleet or any of its operators.

There are three overall considerations to every effective fleet management program:

- Selecting/Training/Monitoring Vehicle Operators
- Selecting/Maintaining Safe Vehicles
- Assigning Responsibility and Ensuring Accountability

### Selecting/Training/Monitoring Vehicle Operators

Selecting/Training/Monitoring vehicle operators involves the initial selection of the employee; obtaining motor vehicle reports/driver's abstracts; interpreting those motor vehicle reports/driver's abstracts; training your employees to operate vehicles safely;

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<sup>1</sup> National Safety Council

Correcting inappropriate driving habits; counseling employees; and monitoring each employee's training and progress.

## **Selecting/Maintaining Safe Vehicles**

Selecting/Maintaining safe vehicles involves the initial selection of the vehicle you are supplying; ensuring daily checks are made of the vehicle's equipment; creating a maintenance schedule and file for each entity vehicle; delegating some individual with the responsibility of ensuring your entity vehicles are maintained in good working order; and ensuring all certificates and legal requirements are satisfied for each vehicle in your fleet.

## **Assigning Responsibility and Ensuring Accountability**

Assigning responsibility and ensuring accountability are the cornerstones of every management program. Just as you set goals for your employees for the overall operation of your entity, you must set the goals you want them to achieve in terms of the safe operation of your fleet. Every fleet management program must start with a firm, clear commitment from you, the entity administration, which tells your employees you value the asset of your entity's fleet; you intend to do everything within your power to protect asset from abuse and unnecessary damage; you expect them to operate your entity's vehicles in a manner which will fulfill your expectations, and; if they don't, you will hold employees accountable for their actions.

## **Safety Policy**

Irrespective of the size of the operation, it is essential for management to make their employees aware a safe operation is of paramount importance. More commonly this directive takes the form of a safety policy. This may be addressed to all employees, but should not leave the impression when the driver is on the road the responsibility is lessened.

The safety policy should state management's concern with safety, including vehicular safety, employee cooperation is expected, and employees will be held accountable for deviations in safe practices. The policy statement should be signed by the owner/president of the entity and well publicized throughout the organization. As management sets the example for the employees, it is imperative everyone adheres to the safety policy at all times.

## **Driver Qualification**

The establishment of a meaningful and realistic driver qualification program is vitally important to the successful operation of any fleet, whether it be a coast to coast interstate operation or an incidental fleet where the primary operation is other than the transportation of freight. Sufficient emphasis on selecting the best available driver will avoid many future problems for management. No business or entity can justify the financial losses resulting from crashes and abuse of equipment.

The opportunity to select the right person for the position will largely depend on management's ability to develop job standards which reflect the prerequisites and skills necessary for satisfactory job performance. Driver selection is a one-time process; assuring the driver remains qualified should be an ongoing process. Driver qualification files should be maintained to facilitate review of the driver's record and provide future reference to the driver's qualifications.

Drivers who meet well-established qualifications will usually have the ability to work and drive safely. In order to achieve a program which is effective and still practical for their operation, management must decide the degree of emphasis in the areas outlined below.

## **Job Analysis**

The first task in any employee selection process is to determine the specific requirements of the job. The employer must determine exactly what the employee must do, how it must be accomplished, and what skills are required. Once these facts are known, management can establish standards which will reflect the specific nature of the position and make it possible to recognize the best applicant. These standards can be physical such as height, weight, hearing, vision, age, etc.; degrees of experience; or skills required. It is imperative these standards be applied equally to all applicants for the position.

## **Recruiting**

Having a firm idea of what type of employee you need will make recruiting much easier. Sources of applicants include upgrading present employees, walk-ins, advertisements, and recommendations from good employees, trade school, driver training schools, or union halls. Providing a brief job description with minimum requirements in an ad or notice will screen out many potential applicants who are unqualified.

## **Application Form**

The application form should provide information on the applicant's driver license(s); driving experience; crash record and traffic violation convictions and forfeitures for the past 3 years; past employment (previous 3 years); education; and physical history. The only questions which should appear on the application form are those which pertain to the driver's potential ability to satisfactorily perform the job. Motor carriers subject to the Federal Motor Carrier Safety Regulations are required to obtain specific information on the application form (see Code of Federal Regulations, Title 49, Transportation, Parts 390-397).

## **Interview**

The purpose of the interview is to develop more detailed information as to the applicant's qualifications and experience as well as his or her general suitability as an employee. A standard interview pattern should be followed for a given job classification in order to obtain all desired information and to afford a means of comparison between

applicants. The interview should be used to resolve any questions regarding the information obtained or omitted on the application form. A visual check of the driver's license should be made to ascertain the driver has the proper class of license.

## **Reference Check**

A check should be made with previous employers to develop information about the driver's general character and professional ability. Factors such as length of employment; job performed, including operation of vehicles; accident record; ability to get along with others; and whether the previous employer would re-hire the individual should be included. A telephone interview, a letter, or a personal visit can accomplish this check. The driver's file should verify these checks were made and record the response received. Motor carriers subject to the Federal Motor Carrier Safety Regulations are required to investigate the Driver's employment record during the preceding 3 years.

## **Motor Vehicle Record**

A copy of the Motor Vehicle Record (MVR) should be obtained from each State where a driver holds a license to ascertain the applicant has a valid license and to review the driver's past record. A driver with a history of crashes and moving traffic violations is likely to continue in that mode. The MVR should be obtained periodically for all drivers and reviewed to determine if remedial training is necessary. It also should be reviewed with the driver and made part of the driver's file. This review may give the supervisor insight as to the driver's attitude regarding traffic rules and regulations. Motor carriers subject to the Federal Motor Carrier Safety Regulations are required, at least once every 12 months, to have each driver submit a list of all violations of motor vehicle traffic laws and ordinances (other than parking) of which the driver has been convicted or on account of which the driver has forfeited bond or collateral during the preceding 12 months.

Note: We recommend that all driver's with or without Commercial Driver's License (CDL) status report any moving violations to their supervisor within 24 to 48 hours of receiving the violation which may occur on or off the job. Subsequently the driver should report to their supervisor the end status of said moving violation once determined by a court of competent jurisdiction. This is to aid the supervisor or other designated person within the organization to determine if some form of discipline up to and including termination may be warranted, or to recommend remedial training for the driver.

An acceptable driving record is one which does not have any DUI, DWI, or similar alcohol or drug-related offenses within the past 5 years. Other serious offenses that should not be on the driving record within the past 3 years include:

- Reckless driving/speed contest
- Careless driving
- Fleeing or eluding a police officer
- Chemical test refusal
- Leaving the scene of an accident
- Failing to report an accident
- Driving after suspension or revocation of license
- Passing a stopped school bus
- Making a false accident report



- Homicide, manslaughter or assault arising from the use of a motor vehicle

The chart below provides a suggested guideline to determine acceptable driving records. Any serious violation should automatically be considered “poor”. “Clear” and “acceptable” MVRs should be reviewed at least annually. “Borderline” MVRs should be reviewed at least every six months.

NUMBER OF VIOLATIONS	NUMBER OF PREVENTABLE CRASHES			
	0	1	2	3
0	CLEAR	ACCEPTABLE	BORDERLINE	POOR
1	ACCEPTABLE	BORDERLINE	BORDERLINE	POOR
2	ACCEPTABLE	BORDERLINE	POOR	POOR
3	BORDERLINE	POOR	POOR	POOR
4	POOR	POOR	POOR	POOR

### Unacceptable operators/drivers

Drivers/operators with any of the following in the preceding 36 months shall be considered unacceptable to operate entity vehicles:

- DWI or DUI citation or conviction
- 2 (two) major violations
- 3 (three) minor violations
- 2 (two) at-fault collisions

Drivers/operators with any of the following in the preceding 12 months shall be considered unacceptable to operate entity vehicles:

- More than 1 (one) collision
- More than 1 (one) moving violation
- More than 1 (one) collision and 1 (one) moving violation, unless resulting from the same incident

### Definitions of Major & Minor Violations

Major violations

- Leaving the scene of an accident
- Homicide involving a vehicle
- Eluding a police office
- Hit and run
- Driving with a suspended or revoked license
- Vehicular manslaughter
- Felony with a vehicle
- Racing, drag racing
- Fraudulent use of a driver’s license
- Careless or reckless driving

- DUI, DWI or possession of a controlled substance
- Permitting an unlicensed person to drive
- Speed 20 MPH or over the posted speed limit

Minor violation

- Any moving violation other than those set forth in the preceding section
- Speeding less than 20 MPH over posted speed limit
- Following too close
- Failure to stop (red light or stop sign)
- Failure to yield right-of-way

## **Physical Qualifications**

The physical fitness of the driver must be considered before hiring. The motor carrier should arrange for physical examinations with individual physicians or industrial clinics. The examining physician should be aware of the physical and emotional demands placed on the driver and should be aware of the requirements of the job so it can be determined if the applicant is qualified for the position. In addition to checking a driver's physical condition before hiring, periodic physical examination should be required and arranged by the motor carrier.

Reexaminations may indicate the onset of a problem and allow appropriate corrective measures to be taken. Drivers subject to the Federal Motor Carrier Safety Regulations are required to be reexamined every 24 months.

## **Road Test**

A road test is one of the ways to find out if drivers can do the job expected of them. The same type of equipment will be assigned to the driver should be used in the test and the test should be sufficiently long to cover a variety of situations. This test should not establish a passing or failing grade, but should indicate the driver's competent areas and weak points. This will allow the employer to provide needed training prior to dispatching the driver. The person who has successfully completed the road test should be given a certificate of completion. Motor carriers subject to the Federal Motor Carrier Safety Regulations are required to verify each driver has been given a road test.

## **Additional Background Information**

Additional background information may be generated through checks with credit bureaus, police departments (where permissible), and through the use of professional investigative agencies.

## **Driver Training**

Training must supplement the driver selection program, as individuals cannot always be selected who have all the knowledge and skills necessary to perform the job in the manner

expected. The amount of training which is needed varies directly with the complexity of the job as well as with the knowledge and experience of the new employee. An effective training program recognizes the knowledge and skills necessary for an employee to perform in a satisfactory and safe manner and attempts to bridge the gap between the employee's existing level of knowledge and the level required. Proper training reduces operational disruptions and minimizes unnecessary costs from crashes and equipment abuse.

"Initial" training should be given to new personnel to get the employee properly indoctrinated prior to starting work. Even drivers with many years of experience have a need for orientation due to differences in types of cargo, vehicles and operations. "Refresher" training can be very useful for regular drivers to update information on operational changes, new routes, cargo, equipment, government regulations, etc. "Remedial" training may be useful when there is a problem of substandard performance which may be alleviated through corrective training. The need for remedial training may be identified by customer complaints, complaints from the public, crash involvement, moving traffic violations or reports of vehicle misuse or abuse. Drivers must be shown the critical relationship between their actions and the success of the enterprise. Effective training is the key to developing proper driver attitude.

There are two general approaches to training: classroom and in-vehicle. Classroom training can be accomplished using either a one-on-one or group approach. This method is useful for entity rules and regulations, federal and state regulations, routes and schedules, crash and emergency procedures, basic cargo handling methods and basic defensive driving techniques. In-vehicle training is most effective for equipment familiarization, vehicle inspections, cargo handling and defensive driving. In-vehicle training provides one of the best methods of giving practical instruction to a driver under closely controlled conditions.

Designation of a driver trainer is worthy of consideration even in the smaller fleet. Such an individual should be one who commands the respect of the other drivers has a good driving record and has the ability to pass on the proper knowledge and skill in a stimulating manner.

The use of driver trainers tends to make instruction more uniform and consistent. It is not necessary to have a full time driver trainer; many fleets train a driver trainer from someone in an existing position in the terminal and use them part time as a trainer.

## **Entity Rules and Policies**

Entity rules and policies should be defined and committed to writing. Smaller operations will want to provide photocopies of this information for each new driver, while larger companies may desire to prepare written booklets. In either case, whoever deals with new personnel should review the more important aspects with a new driver.

## **Use of Personal Vehicles for Entity Business**

The following practices are suggested for use of non-owned vehicles for company business:

- Anyone who uses his/her personal vehicle for entity business should be on an approved driver list. All those who use their personal vehicle for entity business must observe the same policies governing the use of entity-owned vehicles. This includes ordering and reviewing the Motor Vehicle Record (MVR) of these drivers.
- The driver should provide a certificate of insurance which shows liability limits of at least \$100,000/\$300,000/\$50,000. This policy should not exclude business use.
- A personal vehicle used for company business should be inspected by the fleet manager at least once every three months.

## **Equipment Familiarization**

Equipment familiarization is necessary to minimize unintentional equipment misuse and abuse. With the large variety of combinations of engines, transmissions and rear ends, it makes good operating sense to show a new driver the proper way to operate the individual equipment for maximum efficiency and minimum maintenance. Special controls, as well as loading and unloading devices, should be demonstrated to new employees. The driver should also be instructed on how to make a proper vehicle inspection.

## **Routes and Schedules**

Routes and schedules should be explained. This could be included in the material given to drivers dealing with entity rules and policies. Routing may be established to avoid congested areas, poor road conditions, high crash frequency areas, and roads with restrictive conditions, such as low or narrow overpasses or bridges with restricted weight limits.

## **Emergency Procedures**

Emergency procedures should be established which deal with crashes and mechanical breakdown. Drivers should be instructed in the proper procedures to be followed if they are involved in a crash. Each vehicle or driver should have an accident report packet with which drivers can record the necessary information. The driver should know how to safeguard the scene to prevent others from being involved. Procedures should be established for the completion of a formal accident report as soon as practical. In the case of mechanical problems, drivers should know what to do with the disabled unit and who to contact regarding repairs.

## **Defensive Driving Techniques**

Defensive driving means driving so as to prevent crashes in spite of the actions of others or the presence of adverse driving conditions. When giving a prospective driver a pre-employment road test, defensive driving techniques should be evaluated. Any bad driving

habits should be corrected prior to a driver's first trip. In order to effectively achieve a change in a driver's habits or attitude it is essential to have in-vehicle training.

## **Regulations**

Traffic regulations and State and Federal Department of Transportation safety regulations should be explained to the new driver with specific emphasis on those regulations peculiar to each entity's own operation.

## **Cargo Handling**

Various cargos require different skills to load, transport, and unload. Dump trucks and trailers, liquid and dry bulk tanks, new car carriers, hazardous materials and "over-size" loads all require specialized knowledge which a driver may not have acquired in his prior experiences. In order to minimize cargo losses, equipment damage and third party claims, it is essential new drivers are made aware of specific hazards and how to deal with them.

## **Driver Supervision**

The realization driver selection and training is vitally important may not be obvious until one has to supervise a motor vehicle fleet. The inherent nature of a fleet operation leaves drivers under their own supervision for a substantial portion of the workday.

A key to success in the supervision of drivers is the supervisor's ability to enhance the development of proper driver attitudes. As attitudes heavily influence the manner in which a job is accomplished, the supervisor must see they receive positive reinforcement and undesirable influences are recognized and counteracted. Each fleet must tailor its own program to suit its particular needs. Some of the more widely recognized segments of programs are outlined below.

## **Routing and Scheduling**

Most operations will have a fairly good idea of factors such as route or area the vehicle will be using, number of miles for the trip, average time required to complete the trip, loading arrangements, etc. These items can be supervised to a limited degree through random checks to verify the driver is actually following the prescribed schedule. Close control of routing and scheduling will make this supervision task less difficult.

## **Vehicle Location**

Depending on type of operation or commodity value, the supervisor may wish to establish certain procedures for verifying the location of the vehicle. This may be accomplished by two-way radio or telephone contact, or designated check-in stations (the arrival and departure times may be recorded by requiring the driver to punch a time clock, where available, or by making an entry in a log book kept at the check-in station).

## **Trip Recorders**

Various mechanical and electrical trip-recording devices are available to aid fleet management with driver monitoring. These include service records, which indicate vehicle movement; cacography, which provide a chart showing events such as when the motor started, idling time, vehicle speed and miles driven; and on-board computers. As with any other means of driver supervision, trip recorders are effective only to the extent the information obtained is used by management.

## **Road Observation**

Road observation allows the observer to directly view the driver's handling of the equipment and thus detect driving faults and rules violations. This can be accomplished through periodic check rides with the driver or through use of a road patrol system. Road patrol may be done by the motor carrier itself, through cooperative efforts with other carriers, or by using organizations which specialize in this function.

## **Logs**

Carriers required to use logs, by the US Department of Transportation, should also find them useful in the supervision of their drivers. These will require careful examination to detect problems.

Comparison with other documentation of the trip may prove helpful in determining the accuracy of log entries.

## **Incentive Programs**

Some drivers will perform expertly for wages alone or the self-satisfaction in accomplishing the task, while others will require additional forms of stimulation. One motivation technique which has withstood the test of time in the motor carrier industry is the incentive program. Incentive programs can be used for crash free driving, fuel-efficient driving, or whatever else is suitable for a particular operation. These programs can provide many different types of awards (pins, patches, belts buckles, etc.) and may provide a substantial return on investment if they are administered properly and stimulate the drivers' interest. The goal of any incentive program can only be reached if there are established rules and procedures to assure the drivers and supervisors alike understand the program and its operation, and complete and accurate records are maintained. Awards should be made promptly, preferably by top management, and before fellow employees. Publicity should be arranged (entity bulletins, local newspapers, etc.) whenever possible.

## **Maintenance**

Well-managed maintenance programs are extremely important in any motor carrier operation. Reduced operational costs, reduced crashes from vehicle defects and improved public opinion are the direct results of a well-implemented maintenance policy. The maintenance of vehicles within a fleet often reflects management's general attitude and outlook. Every fleet can benefit from a review of its existing program and the degree to which it is being carried out on a daily basis.

When a motor carrier performs its own maintenance, adequate maintenance facilities and equipment must be provided as well as thorough training and retraining of mechanics to keep them abreast of changes in equipment and repair procedures.

## **Vehicle Specification**

A fleet's maintenance program must start with the ordering of vehicles. It is essential a fleet purchase or lease vehicles be designed for the specific job for which they are going to be used. This requires fleet management to analyze their transportation needs and determine what is expected of the vehicles in the fleet. If a vehicle is improperly "spaced," it will reflect in the vehicle's performance and cost. One that is over-spaced will cost too much initially and the additional cost probably will not return its proportionate share in reduced operating expense. If it is under-spaced, management can anticipate shorter life, more breakdowns, and a higher overall maintenance cost.

Most fleets find the standardization of vehicles within their fleet is advantageous. Vehicle standardization can be by manufacturer and model type or by component within the vehicle. Advantages to standardization include reduced parts inventory, enhanced ability of mechanics to make repairs more efficiently and dependably due to their familiarity with the various components, reduction of inadvertent abuse of vehicles by drivers, and, if the fleet has many similar units, better appraisal of the suitability of equipment for the task.

While standardization has definite benefits, it also has some drawbacks must be recognized if management is to derive the maximum benefit when selecting equipment. If management restricts all buying to one supplier, they may not have the necessary leverage to obtain the most competitive price. This is one of the main reasons those who do standardize sometimes do so with two or three different suppliers.

## **Preventative Maintenance**

For a vehicle to give the most economical service possible it is essential a fleet have a realistic preventative maintenance system. The groundwork for a good preventative maintenance system usually starts with the manufacturer's recommendations concerning necessary maintenance and the time or mileage at which it should be performed. This is then modified by the actual experience of the fleet. Careful consideration must be given to the maintenance, which must be performed in order not to void the manufacturer's warranty. Preventative maintenance allows a firm to schedule its repair work so it is not faced with large fluctuations in workflow.

Uniform workflow has the obvious advantage of stabilizing the work force needed. Preventative maintenance differs from demand or crisis maintenance in that it attempts to anticipate problems and plan for their correction before they become serious. Normally, preventative maintenance is performed on a mileage or a time basis. Typical jobs which are normally performed on a routine basis are oil and filter changes, lubrication, tightening of components, engine tune-ups, brake jobs, tire rotation, replacement of specific engine hoses, radiator maintenance, etc. The preventative maintenance interval will vary from one fleet to another depending on the initial vehicle specifications, type of operation the vehicle is



Used in (as well as terrain covered) and management's appreciation and knowledge of operational costs.

A well-defined consistently applied preventative maintenance program will result in the lowest total maintenance cost.

### **Demand Maintenance**

When maintenance is performed only when the need arises it is often referred to as demand maintenance.

Some vehicle parts are only replaced on a "when failed" basis (i.e., light bulbs, springs, window glass, wiper blades, air lines, wiring, gauges, seat cushions, etc.). Other parts will be replaced or repaired when they are worn and this wear is detected by periodic inspections (i.e., tires; engine, transmission and rear-end rebuilds; universal joints; bushings; batteries; fatigued, corroded or deteriorated structural members; etc.).

### **Crisis Maintenance**

If preventative maintenance or demand maintenance is ignored or postponed, the inevitable result will be crisis maintenance when a vehicle has a breakdown on the road. Mechanics will have to be sent out to repair the vehicle or possibly another unit will have to be dispatched to replace the one having problems. In extreme cases the mechanical failure could cause, either directly or indirectly, a crash. Often times the failure of an item should have been detected and replaced will result in damaging other components parts.

Crisis maintenance is much more expensive than preventative or demand maintenance due to the cost of the driver's downtime, phone calls, supervisory time required to organize necessary repair procedures, mechanic's time traveling to and from the breakdown, transportation of the mechanic to and from the breakdown (or cost of having an outside garage make repairs), inefficiency of a mechanic working on the road versus working at a garage, and cost of any additional parts damaged.

### **Maintenance Records**

A thorough, up-to-date, record-keeping program supports every good maintenance program. In times of high parts prices and tight budgets, management cannot afford the luxury of guessing about maintenance costs and past performance of vehicles or accessories.

To be useful, maintenance records must be kept current, must only record meaningful data, and must be reviewed on a periodic basis. One maintenance record every fleet should use is the driver's vehicle inspection report. This form gives the driver direction in inspecting the vehicle in a systematic manner so the driver does not inadvertently overlook any important areas. It also provides a convenient means for the driver to note vehicle deficiencies and report it to the maintenance department.

Vehicle inspection reports can be made out daily (required by the Federal Motor Carrier Safety Regulations) or can be completed on an exception basis that is, they are only filled

out and turned in when a deficiency is noted. By keeping a current copy of the report on the vehicle, the driver, mechanic or other interested parties can ascertain at a glance the known mechanical problems with the vehicle. Verbal reports are not recommended.

Every vehicle should have a record of all the preventative maintenance and repair work which has been performed. Such a record will allow management to develop needed cost data and review the past performance of a specific vehicle or group of vehicles. It allows management to analyze the maintenance work which has been performed on a vehicle to determine if additional work is necessary or can be expected. It also gives clues to problems which have been overlooked in routine maintenance.

As a vehicle's age and mileage increase the maintenance costs will increase. There is a "break-even point" at which maintenance costs plus depreciation exceed the cost of a new vehicle. Accurate maintenance records will allow management to determine that point.

## **Routing and Scheduling**

Routing and scheduling play a vital role in the overall control of the fleet. Whether it is a local or long haul operation, serious consideration must be given to optimizing the safe movement of freight.

### **Routing of Equipment**

Whenever possible, routes should be defined with consideration of economical operation and minimum exposure to road hazards. Factors to be examined include type of road, condition of road, obstructions such as low or narrow underpasses and bridges, unusually hazardous intersections, railroad crossings, etc. Hazardous materials, oversize and weight loads warrant special consideration when planning routes. Without guidance, drivers will sometimes choose routes which are unacceptable due to size or weight limitations or the condition of the roadway. This may result in a drain on an entity's budget due to delays, equipment damage or crashes.

### **Scheduling of Equipment and Drivers**

Scheduling means planning to make the most effective use of the vehicles and drivers at your disposal. It involves the assignment of vehicles in good operating condition to handle loads within their designed capacity and legal limitations, and for which they were designed, and the scheduling of drivers who are in good physical condition and well rested.

The ideal situation achieves prompt and efficient delivery by keeping the maximum payload on each unit, by avoiding idle hours on units and keeping deadheading to a minimum. Proper scheduling involves consideration of the best time a vehicle should reach its destination, the best time to make the trip and the required departure time necessary to accomplish this. Scheduling must also allow for proper maintenance between trips. Special consideration should be given to hazardous or high value commodities.

## **Local Operations**

The basic principles of routing and scheduling apply to both long haul and local operations. In local operations, however, consideration must be given to rush-hour traffic, highly congested areas and peculiarities of the area being served.

Most major communities and many small municipalities have made studies of the traffic flow pattern at various hours of the day and night. Similarly, crash location maps are available to show areas of high crash frequency. Motor fleet executives should be able to obtain copies of such studies from police or traffic departments in order to determine areas to avoid at certain times. If published copies of such studies are not available, arrangements can certainly be made to examine such reports in the offices of the official agency having this information. It is a foregone conclusion municipal official responsible for traffic control will welcome the effort of fleet operators to route vehicles in such a way as to prevent street congestion.

## **Crash Reporting, Recording, and Analysis**

As every crash results in a reduction of entity assets, either through lost time or money, the management of any motor vehicle fleet, irrespective of size or type, should consider the elimination of all crashes as a major goal.

In order to achieve this, a well-established system of reporting, recording and analyzing the facts surrounding vehicular crashes must be created. These procedures should be reviewed often to assure all those involved will know how to handle the situation in the event of a crash.

## **Driver Responsibility**

As the driver will be the first person at the crash scene, the driver's initial actions are often critical to minimizing the end results of the crash. The driver may be under extreme stress at the time, thus the procedures to follow must be clear and concise, and thoroughly understood.

To help facilitate this, information packet containing instructions and forms for use in the event of a crash should be carried on the vehicle at all times.

Assuming the driver is capable, the first step in accident reporting is for the driver to complete a preliminary accident report to gather all pertinent information at the scene of the crash. Thoroughness in performing this task will be of great help in assessing the crash afterwards.

Once the driver has obtained the basic information on the preliminary crash report the motor carrier should be contacted.

## **Management's Responsibility**

When the driver calls the motor carrier to report the crash, the process is expedited if a checklist for recording crash data is available for the person receiving the information. This will aid in collecting all vital facts so it can be determined if someone should be immediately dispatched to the crash scene.

If there are any fatalities, multiple serious injuries or extensive property damage, it is normally considered desirable to send someone to the crash scene immediately to initiate the investigation. It is a foregone conclusion if the driver is injured or killed someone should be dispatched to the crash scene to represent the motor carrier.

All crashes should be investigated to some extent. Management needs to know exactly what happened and why it happened in order to determine what might be done to prevent a similar occurrence in the future. Key personnel should be trained in basic crash investigation and the investigation should be started as soon as possible, while people's memories are fresh and/or evidence is still available. The investigator should determine how the crash occurred, what physical evidence might be available, and any factors contributing to the crash. The investigator should be able to reconstruct the events leading to the crash and record those facts for future reference.

## **Accident Records**

An entity representative should complete a formal accident report to be sent to the Clear Risk Solutions as soon as possible, as well as any state or Federal government reports which may be required. A permanent file should contain all the pertinent information concerning the crash including the preliminary crash report from the driver, copies of accident reports submitted to various agencies, crash investigation data, police records, and any other information which might be useful in evaluating the crash.

All vehicle crashes should be recorded, in chronological order, in a "crash register" to provide the motor carrier with an overall summary. Analyzing the crash register may indicate problem areas or trends which would not otherwise be obvious by reviewing crash reports separately. The crash register should include at least the following information:

- Date of Crash
- Name of Driver
- Vehicle Identification Number(s)
- Location of Crash
- Brief Description of Crash
- Fatalities
- Injuries
- Property Damage

## **Determining the Preventability of Accidents**

At this point a determination should be made as to whether the crash was a "preventable crash" on the part of the entity's driver. This is irrespective of the legal conditions surrounding a crash, as preventability relates to "defensive driving" and not legal culpability.

A preventable crash is one in which the driver failed to exercise every reasonable precaution to prevent the crash. In order to avoid becoming involved in a preventable crash it is necessary for a driver to understand the concept of and practice defensive driving.

Defensive driving is driving to prevent crashes in spite of the incorrect actions of others or adverse driving conditions such as weather, traffic, lighting, vehicle or road condition, or the driver's physical or mental state. The results should be entered on the driver's individual record card, thus giving management a complete synopsis of the person's driving history. Reviewing that record may indicate remedial training or disciplinary action is necessary.

## **Crash Analysis**

Proper crash analysis involves the gathering of facts, arranging them in a usable format, and analyzing what transpired. A properly developed accident reporting and recording system will allow management to not only determine "primary" causes of crashes but will also help identify "contributing" causes which might be overlooked otherwise.

The investigation of each crash should seek not only the specific act which was involved but should go further into the conditions responsible so your control program can be set up to correct these conditions. This means checking the driver's record for similar occurrences, length of service, indications of poor attitude or lack of skill. It means questioning whether a proper job of selection was done and whether training was adequate:

- Does it appear the driver has been properly supervised and were there previous indications which should have warned of this impending crash?
- Were there any equipment deficiencies involved?
- Could the scheduling or routing be improved and is there any indication of improper maintenance?

Such an investigation helps to show the basic conditions responsible and point out the area in which either specific or general corrective action should be taken. The information derived from the crash analysis should be used constructively to educate employees or change procedures in an effort to prevent future occurrences.

## **Program Development and Evaluation**

Proper consideration in the selection, training with supervision of drivers and the selection, scheduling, routing and maintenance of equipment should result in a smooth, well-knit operation and achievement of management's goals.

A breakdown in any of these areas will produce undesirable results in terms of delays, crashes, damaged equipment and cargo, poor morale, customer complaints and high operating costs.

A careful examination of your operating procedures and crash records should identify some possible shortcomings of your present operations. To help you systematically evaluate the major areas of concern we have developed a checklist (below) highlighting those items. During the evaluation, note the different conditions you feel may be responsible for present operating problems or could lead to future problems. This should provide you with some indication of what actions might solve the most problems and allow you to establish priorities for corrective action. Discuss your findings with other supervisors whenever possible to get their input and to foster a team effort to implement improvements.

Remember certain actions you take may work to improve several problems. For example, improvement in the preventative maintenance program can help reduce maintenance costs, prolong the life of equipment, eliminate road failures, reduce crashes due to mechanical failure, and improve driver attitude regarding equipment condition.

Establishment of more effective driver training methods can improve skill and emphasize approved procedures which tend to eliminate mistakes, miss-deliveries, and cargo damage and citizen complaints. The practice of defensive driving principles will reduce crashes, will reduce damage to equipment and cargo, and reduce excessive operating costs.

The following questions should be exemplary of the type of approach you should take when reviewing operating procedures. Keep records of what problems you feel exist to enable you to justify corrective action and to identify new trends as they develop.

***Driver Selection***

- Do you have a definite program for driver selection?
- Is it as good as it should be and is it adhered to, or is it mostly on paper and frequently forgotten when you are busy or short of drivers?

***Driver Training***

- Do you have a definite training program or is it on a "hit or miss" basis?
- Do you check the driver's past record carefully to determine if reported experience and knowledge are factual?
- Does your program provide for retraining as necessary when unsatisfactory performance or crashes are identified?

***Driver Supervision***

- Are your supervisory responsibilities adequately handled, or is there overlapping and occasional friction?
- Are there areas where no one is clearly responsible?
- Can your relations with your drivers be improved?

***Equipment***

- Is the equipment adequately designed for the job it is expected to do?
- Is the physical condition of your equipment good or is it below average?
- Do you have a well-defined and adequate preventative maintenance program and is it being followed?
- Is your spare parts inventory adequate, thus avoiding delays and idle equipment, or is it excessive, thus tying up an unnecessary amount of capital?
- Could increased standardization of equipment reduce inventory?
- Do you have a definite equipment replacement program?

***Routing and Scheduling***

- Can you improve on these procedures for greater efficiency of operation and greater safety?

***Damage to Equipment and Cargo***

- Where, when and why is damage to equipment occurring, either as a result of crashes or other causes?
- Where, when and why is damage to cargo, other than those caused by highway crashes, taking place?

***Security***

- Where, when and why are cargo shortages and overages occurring?

***Operating Costs***

- Have you analyzed your operating costs to the degree you can determine the operating costs for a particular unit?
- How do your operating costs per unit compare with your fleet average?
- How do your operating costs per unit compare with other similar fleets?
- If this figure is high what is the cause?

***Citizen Complaints***

- Do you keep a record of all customer complaints?
- Are complaints due to delays, cargo damage, short deliveries, etc.?

Corrective action should be specific. Each action you contemplate should be thoroughly reviewed to verify there is agreement the action should be effective, when it will be taken, who will be involved in implementing it and how it should be implemented. Make sure everyone is following the actions agreed upon and keep in touch with those involved to ascertain if they are having any difficulty or have any criticism of the plans put into effect.

Check to see if the program is accomplishing what it was intended to accomplish. If not, verify all involved are properly implementing the recommendations and sufficient time has elapsed to verify the results. Emphasize the program will never be "perfect" in your contacts with other supervisors. Point out you are constantly seeking improvements and necessary revisions must be made as the need for them becomes apparent. Periodic

reevaluation is the only way to verify operating procedures are maintained at peak performance levels.

No matter what kind of highway safety program you have in mind for your workplace-and remember, even the smallest program can bring significant cost savings-you can follow these six simple steps.

## **6 Steps to Driver Safety**

### **Step #1: Obtain Management's Commitment**

To develop a fleet management program, you need the support of management. To obtain that support, you need to show that a highway safety program in the workplace is affordable and simple to implement, that it will alter employee behavior, and that it will have a positive impact on entity budgets.

#### *How to Approach Management*

- Refer to some of the facts and statistics on pages 27 & 28 to demonstrate the costs associated with traffic crashes.
- Illustrate the potential cost savings of a highway safety program.
- Explain how staff resources could be used effectively to organize a program.
- Explain how the program will be evaluated and how progress will be reported to management.
- If management is still not convinced of the need for the program, suggest that they conduct a simple needs assessment, collecting information on current costs associated with highway injuries and baseline data on employee attitudes and behaviors related to highway safety. Then, if it looks as if there really is a demonstrable need for change, they will be more likely to support a program.

### **Step #2: Identify Your Costs**

Identifying exactly what your entity pays out for motor vehicle crashes will help you demonstrate the need for a comprehensive motor vehicle and pedestrian safety program. Cost analysis will also enable you to focus the resources where they will be most helpful.

#### *Where to Start*

Start by collecting data on both the direct and indirect costs to your entity of all motor vehicle crashes in which employees were involved. Work with your human resource manager, safety manager, workers' compensation representative, accountants, and medical and motor vehicle insurance representatives to obtain the numbers you'll need.



### *Using the Worksheet*

At the end of this booklet, you will find Worksheet 1: Costs of Highway Crashes. Identify each itemized expense that is relevant to your entity, collect the necessary data, and total your entity's expenditures. If your entity has incurred expenses that are not itemized on this list, be sure to add them to the worksheet.

## **Step #3: Develop an Action Plan**

- ***Set concrete objectives***

Write your objectives in terms of concrete, measurable behaviors.

- ***Set a realistic date for meeting each objective***

Example: "Raise employee use of safety belts on the job from 42% to 50% in the next 60 days." Each month, choose activities that support the objectives. In order to ensure that you meet your objectives, you must arrange for ongoing activities that support your goals. When designing these activities, be sure that they relate directly to the attitudes and behaviors you want to change, and assign responsibilities clearly. Example: "Personnel will distribute a fact sheet on the importance of safety belt use to every employee this week."

- ***Design a system for documenting your results.***

Assign specific personnel and record-keeping systems for documenting each activity designed to reach your objectives. Note any problems in implementation.

- ***Create an evaluation plan.***

Formulate a plan for evaluating the success of your program. In order to have a clear criterion for assessing progress, collect baseline data on relevant factors such as safety belt use before implementing your traffic safety program. Determine exactly how to measure changes in attitudes and behavior. (See Step #6.) Determine who will be in charge of evaluations and how often evaluations will be conducted.

## **Step #4: Implement Highway Safety Policies**

Create a clear and comprehensive set of traffic safety policies and communicate them to all employees. Post them throughout the workplace, distribute copies periodically, and discuss the policies at entity meetings. Offer incentives for sticking to the rules, and point out the consequences of disregarding them. Feel free to adapt the following sample policies for your use.

- ***Sample Alcohol Use Policy***

"This entity has a vital interest in maintaining safe, healthy, and efficient working conditions for its employees. Therefore, the consumption of alcohol by any employee during 'duty hours' is prohibited. Duty hours consist of all working hours, including break periods and on-call periods, whether on or off entity

premises. The consumption of alcohol while performing entity business or while in an entity facility is prohibited. The use of alcohol during non-working hours under circumstances that this entity determines adversely affect the entity's reputation in the community is also prohibited."

- ***Sample Safety Belt Use Policy***

"This entity recognizes that safety belt use is an important and effective means of protecting our employees. Employees should always use safety belts while traveling on official business, and employees should operate vehicles only after passengers are buckled up. Establishing mandatory safety belt use is now a policy of the highest priority."

## **Step #5: Implement an Awareness Campaign**

Encourage employees to come up with fun, creative ways to boost awareness of safety issues and procedures. Invite suggestions on what types of special privileges and awards would most likely motivate employees to engage in safe driving practices. To get you started, here are some ideas for year-round activities.

### ***Winter***

- Create a list of "Duties of a Responsible Party Host," and send it out as a memo or post it on the bulletin board. Include recipes for non-alcoholic beverages and tips on how to handle intoxicated guests.
- Sponsor a "Designated Driver" program at your entity's holiday party. Offer a special gift to any employee or guest who agrees to be a designated driver and abstains from drinking alcoholic beverages that evening.
- For the holidays, donate child safety seats to a local charity.
- Challenge your employees to come up with ideas for alcohol-free holiday activities. Pick one to sponsor.

### ***Spring***

- Conduct a safety belt check day. Have parking lot attendants check drivers and passengers as they enter and leave the lot. Different departments or shifts can compete for the highest use rate. Offer awards for the winners.
- Start a "Saved by the Belt/Safety Seat/Helmet" feature in your entity newsletter. Request first-person accounts of how safety belts, car seats, and motorcycle or bicycle helmets saved the lives of employees and their family members.
- Sponsor a brown-bag lunch and invite a speaker from your local highway safety office, police department, or fire station to discuss highway safety issues.

### ***Summer***

- Promote the use of safety belts in paycheck stuffers. Remind employees to always obey posted speed limits and not to drink and drive, especially during the busy vacation season between Memorial Day and Labor Day.

- Host an entity picnic, and as employees and their families arrive, give a reward to each person who is wearing a safety belt, using child safety seats, or wearing a motorcycle or bicycle helmet.
- Sponsor a contest in which the children of employees develop traffic safety messages for Father's Day. Post the entries so that they are visible to employees and visitors. Judge the entries by age group and present the winners with coloring books, free movie passes, or T-shirts.
- Spread the message to your employees that while motorcycles and bicycles are fun, motorcycle- and bicycle-related injuries are not.

### *Fall*

- Send employees reminders about the beginning of the new school year and the need to pay special attention to children boarding and exiting school buses.
- Hold a raffle for safety items such as bicycle helmets and car seats at the next employee meeting. Begin the meeting with a reminder to buckle up, obey posted speed limits, avoid drinking and driving, and always wear motorcycle or bicycle helmets.
- Hold a pizza party or potluck lunch to celebrate a crash-free quarter or month. Feature the event in your entity newsletter.
- Collaborate with a local college or high school to offer defensive driving courses to young employees.

## **Step #6: Evaluate Your Program**

At regular intervals, evaluate the progress your employees have made toward reaching your program objective. Consider each objective carefully when deciding what evaluation method to use.

If you are having trouble devising a way to evaluate a certain objective, maybe the objective itself is too vaguely written. Revise it so that it describes a measurable or observable behavior, as in the following example:

***Difficult to measure reliably:** "Employees understand the concept of the designated driver."*

***Easier to measure reliably:** "One hundred percent of employees are able, when asked, to define a 'designated driver' as the member of a group who refrains completely from consuming alcohol at a social event and takes responsibility for driving home friends or fellow workers who have consumed alcohol."*

Evaluation should be ongoing. If you learn your employees' highway safety habits are improving, great! Get the information out to management and the workforce alike to justify the program and reinforce learning. But if evaluation shows that you are not yet achieving success, don't be discouraged. You've just obtained valuable information that can help you refocus your efforts in more productive ways.

*Using the Worksheet*

At the end of this booklet, you will find *Worksheet 2: Sample Evaluation Formats*. These formats are provided to show you some of the different ways you can evaluate different kinds of objectives.

For example, Sample Objective #1 deals with employee attitudes and beliefs. A good way to learn about people's attitudes is to ask them direct questions, such as those in the three Sample Questionnaire Items provided. When you write your own questionnaires, make sure that each attitude or belief is clearly stated and that you give employees a range of responses to check or circle.

Sample Objective #2 deals with hard financial data related to company expenditures over a target time period. The best way to collect this data is with a written data collection form. Use the same form whenever you collect data, so that you can easily compare findings from different time periods.

Sample Objective #3 deals with actual employee behaviors. The best way to measure this kind of objective is through real-life observations. To help you make and record accurate observations, use a written form like the one shown on the worksheet.

See Step #2 on how to use this worksheet.

Direct Costs	Cost
Workers' compensation benefits	\$ _____
Healthcare costs for off-duty injuries	\$ _____
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	\$ _____
<b>TOTAL</b>	<b>\$ _____</b>

Indirect Costs	Cost
Supervisor's time (rescheduling, making special arrangements)	\$_____
Fleet manager 's time to coordinate vehicle repair, replacement, etc.	\$_____
Reassignment of personnel to cover for missing employees (less efficiency)	\$_____
Overtime pay (to cover work of missing employees)	\$_____
Employee replacement	\$_____
Reentry and retraining of injured employees	\$_____
Administrative costs (documentation of injuries, treatment, absences; crash investigation)	\$_____
Inspection costs	\$_____
Failure to meet customer requirements resulting in loss of business	\$_____
<b>TOTAL</b>	<b>\$_____</b>

See Step #6 on how to use this worksheet.

**Sample Objective #1:** Employees will demonstrate attitudes and beliefs that foster compliance with motor vehicle safety regulations.

<b>Sample Questionnaire Items</b>				
<b>Posted speed limits should be followed exactly.</b>				
Strongly Agree	Agree	Disagree	Strongly Disagree	
<b>It is safe to drive after drinking alcohol as long as you drive more slowly than usual.</b>				
Agree	Uncertain	Disagree		
<b>Children should be buckled into safety seats every time they travel in a motor vehicle.</b>				
Strongly Agree	Agree	Disagree	Strongly Disagree	

**Sample Objective #2:** Dollars spent on workers' compensation will drop by at least 10% between the first and second quarters of the year.

Sample Data Collection Form

<b>Dollars spent on workers' compensation</b>	
First Quarter \$_____	Second Quarter \$_____

**Sample Objective #3:** The number of employees observed following the company's highway safety policies will rise by at least 25% by the end of the first year after implementation.

Sample Form for Direct Observation

<b>Number of employees observed wearing seat belts or helmets when entering parking lot on annual check day</b>	
Before program instituted_____	After program begun_____

<b>Number of infants strapped into regulation safety seats</b>	
Last year's picnic_____	This year's picnic_____

<b>Number of official designated drivers at holiday party</b>	
Last year_____	This year_____

# Sample Policy Template: Fleet Management Program

## 1. INTRODUCTION

1.1. Our Fleet Management Program has three main objectives:

- 1.1.1. To select and utilize operators of ENTITY-owned or controlled vehicles who have satisfactory or better driving records.
- 1.1.2. To create mechanisms to assist in the safe and proper maintenance, registration and insurance of ENTITY-owned or controlled vehicles.
- 1.1.3. To create mechanisms to assist the ENTITY to select qualified drivers to operate fleet vehicles in a safe and courteous fashion which reflects positively on ENTITY.

1.2. We ask for cooperation and compliance from each employee and manager who operates or supervises a work unit in which ENTITY vehicles are operated.

## 2. DEFINITIONS

**The Fleet:** The Fleet consists of all ENTITY-owned or leased motor vehicles. It includes all automobiles, station wagons, pick-up trucks, vans, buses, large trucks and all other classes of vehicles operated routinely on public roads.

**Fleet Driver:** A Fleet Driver is any employee, student or other authorized operator assigned or allowed to operate a Fleet vehicle.

**DOT (Department of Transportation) Driver:** Specialized individual operator, who by virtue of function or vehicle operated is subject to additional federal regulatory restrictions. Will possess a CDL (Commercial Driver's License) to operate fleet vehicle(s).

**MVR (Motor Vehicle Record):** A certified copy of an individual's driving record for at least the past three years of operation, obtained from the Department of Motor Vehicles in the state in which the driver's license is issued.

**Crash:** A term used in place of “accident” used to describe an undesirable event damaging a vehicle or injuring a person with a vehicle.

## **1. CLASSIFICATION OF DRIVERS**

1.1. Drivers are classified according to vehicle use and the amount of time spent driving. All drivers fall into one of the following three categories:

- 1.1.1. **Category I – Incidental Drivers:** Includes automobile and light truck drivers who operate vehicles for transportation to and from work locations or for light or incidental pickup and delivery work. Intended for employees whose job classification requires operation of a vehicle for less than 50% of total time.
- 1.1.2. **Category II – Regular Drivers:** Includes any employee classified as a driver, or primarily functions as a full-time driver. Also, employees who regularly spend more than 50% of their time operating and loading or unloading vehicles.
- 1.1.3. **Category III – DOT Drivers:** Includes ONLY employees subject to Department of Transportation, Federal Motor Carrier Safety Regulations. Intended primarily for operators of oversized or specialized equipment, or tractor-trailer combinations. Includes holders of CDL (Commercial Driver's License), primarily the Trash Truck Driver. Specific instructions regarding the location, frequency and types of pre-assignment and post-crash drug and alcohol testing will be provided to each DOT driver prior to assignment.

## **2. PROGRAM REGULATIONS**

### 2.1. Use of Fleet Vehicles

- 2.1.1. ENTITY -owned or controlled vehicles are provided and maintained primarily for ENTITY business use.
- 2.1.2. Employees assigned to operate or allowed control over an ENTITY vehicle are expected and required to follow the Fleet Management Program regulations and maintain a satisfactory or better driving record.
- 2.1.3. Employees who lose the privilege of operating ENTITY vehicles subject themselves to possible reassignment, disciplinary action or termination.
- 2.1.4. No personal use of ENTITY-owned or controlled vehicles is permitted.
- 2.1.5. Non-exempt employees are not permitted to use assigned ENTITY vehicles for personal business unless prior authorization from the operating unit manager or supervisor is obtained.



## **2.2. Fleet Driver Responsibility**

- 2.2.1. Each operator of an **ENTITY** vehicle is responsible for the following:
- 2.2.1.1. Participation in fleet safety training program and successful completion of corrective driving program(s), if required.
  - 2.2.1.2. Operation of **ENTITY** vehicles in compliance with **ENTITY**, local, State and Federal regulations.
  - 2.2.1.3. Reporting of all unsafe vehicle conditions immediately to his/her supervisor.
  - 2.2.1.4. Prompt and accurate preparation and submission of all required vehicle reports to his/her supervisor.
  - 2.2.1.5. Immediate written notification to his/her supervisor of all crashes and traffic violations, whether involving **ENTITY** or privately owned vehicles.

## **2.3. Operating Unit Manager's Responsibility**

- 2.3.1. Each manager who has Fleet vehicles assigned to his/her operation is responsible for the following:
- 2.3.1.1. Equitable and consistent application of the Fleet Safety regulations throughout his/her operation.
  - 2.3.1.2. Ensuring his/her Fleet vehicles are properly licensed, inspected and maintained.
  - 2.3.1.3. Ensuring only properly licensed and qualified drivers are selected and assigned **ENTITY** vehicles to operate.
  - 2.3.1.4. The identification of program violators and/or poor drivers and issuance of corrective, or if necessary, disciplinary action.
  - 2.3.1.5. The issuance and replenishment of "glove-box" accident reporting kits.

## **2.4. Fleet Safety Coordinator**

- 2.4.1. The coordinator of Fleet Safety is responsible for the following:
- 2.4.1.1. Training of operating unit managers in regard to their role in the Fleet Safety program.
  - 2.4.1.2. Preparation and maintenance of program monitoring records.
  - 2.4.1.3. Coordination of the reporting, investigating and claims management of all fleet driver crashes and vehicle related damage or property loss incidents.
  - 2.4.1.4. Identification of program violators and poor drivers and the coordination of associated disciplinary action.

- 2.4.1.5. Classification as "preventable" or "non-preventable" of:
- crashes involving a fleet vehicle where damage only to the fleet vehicle or to other ENTITY property is involved, or
  - Crashes involving a fleet vehicle causing minor damage to property of a third party.
- 2.4.2. For any crash involving significant property damage to a third party or any physical injury, however minor, to anyone, the Fleet Safety Coordinator will cooperate with the ENTITY's insurance carriers, their investigators and counsel to the ENTITY in any investigation. Judgments with respect to preventability in these instances will be reached with full consultation with the ENTITY's insurance carrier and counsel.
- 2.4.3. The preparation of program status reports and the reporting of program violations and problems to senior ENTITY administrators.

## **2.5. Fleet Safety Investigator**

- 2.5.1. Members of the Safety Committee will serve as Fleet Safety Investigators and will be responsible for the following:
- 2.5.1.1. Acquisition of certified driving records for each new employee assigned as a regular driver, and the annual acquisition/review of certified driving records for a sample of current employees assigned as incidental drivers.
- 2.5.1.2. Completion of the new employee/new driver certification paperwork.
- 2.5.1.3. Investigation and review of each crash involving ENTITY fleet vehicles. Submission of recommendation(s) to prevent reoccurrence.
- 2.5.1.4. Coordination of the delivery of the ENTITY Safe Driver Program to new fleet operators. Utilization of the program on VCR tapes may be used in lieu of attendance by certain employees.
- 2.5.1.5. Providing assistance to Fleet Safety Coordinator, preparing reports as needed or requested, and providing assistance to operating unit managers as needed or required.

### **3. DRIVER SELECTION PROCESS**

**3.1.** Each new employee or individual who is being assigned to operate a fleet vehicle must follow the following procedure:

#### **3.1.1. New Employee**

- 3.1.1.1. Each applicant must complete an Employment Application and have it on file with the Human Resources Department prior to the start of the driver selection process.
- 3.1.1.2. Each applicant for a position in which he/she might be required to operate a fleet vehicle must produce a valid operating license issued by the state in which he/she resides. A photocopy of the license should be attached to the employment application.
- 3.1.1.3. Each candidate who is being considered for assignment as an incidental or regular driver must complete a Driving Record Certification Report form (Appendix D) which should be attached to the application.
- 3.1.1.4. A copy of the employment application, photocopy of the driver's license and driving record certification form should be sent to the administration for processing.
- 3.1.1.5. A new employee may be assigned as an incidental driver PRIOR to his/her Motor Vehicle Record check only if the employee has certified on the driving record questionnaire he/she was not involved in any crashes or cited for moving traffic violations in the previous 3 years.
- 3.1.1.6. Regular and DOT drivers must not be assigned to operate fleet vehicles until the MVR check is completed and found acceptable.

#### **3.1.2. Current Employees Seeking Assignment as Fleet Driver**

- 3.1.2.1. A current employee who is seeking assignment as an incidental or regular driver must complete a Driving Record Certification Report form (Appendix D). The completed report along with a copy of the employee's driver's license should be sent to the Human Resources Office for processing.
- 3.1.2.2. Current employees may be assigned as incidental drivers after certification on the Driving Record Certification Report he/she has not been involved in any crashes nor cited for moving traffic violations within the last three years.
- 3.1.2.3. Regular and DOT drivers must not be assigned to operate Fleet vehicles until the MVR check is completed and found acceptable.
- 3.1.2.4. Eligibility Requirements for New Fleet Drivers
- 3.1.2.5. A complete list of eligibility requirements is contained in Appendix B.

### **3.2. Safe Driver Program**

- 3.2.1. Incidental Drivers: Satisfactory completion of the ENTITY Safe Driver Program within 90 days of employment or assignment. This program consists of Regular Drivers and DOT Drivers: Satisfactory completion of the ENTITY Safe Driver program prior to assignment as a Fleet Driver.

### **3.3. Fleet Driver Operating Status**

- 3.3.1. A record of each Fleet Driver's status will be maintained by the Fleet Safety Coordinator.
- 3.3.2. No separate operating permit will be issued for operation of ENTITY Fleet vehicles.
- 3.3.3. The Fleet Safety Coordinator will assure the operating unit manager is notified in writing at any time a Fleet Driver's operating status within their unit is withdrawn or negatively impacted.

## **4. FLEET SAFETY REGULATIONS**

- 4.1. No employee may operate an ENTITY-owned or controlled vehicle without a valid state operator's license for the particular class of vehicle. Each Fleet Driver must produce at least annually or upon demand a valid state operator's license.
- 4.2. No employee may operate a Fleet vehicle without being in the ACTIVE Fleet Driver operating status, as maintained by the Fleet Safety Coordinator.
- 4.3. Each driver must attend initial driver orientation and other Fleet safety presentations as scheduled or required.
- 4.4. No driver shall operate a Fleet vehicle at any time without wearing a seat belt and requiring all passengers to wear a seat belt.
- 4.5. All occupants of ENTITY vehicles are required to comply with applicable State motor vehicle laws, including laws which require occupants of a vehicle's front seat(s) to use seat belts.
- 4.6. No driver shall operate a cellular telephone while driving an ENTITY-owned vehicle, except when utilizing a hands-free headset or speaker-microphone system.
- 4.7. No employee shall operate a Fleet vehicle in violation of ENTITY, local, State or Federal regulations. (Employees are responsible for paying all parking and traffic violation fines and associated costs incurred while operating or in charge of an ENTITY vehicle.)

- 4.8. No employee may operate a Fleet vehicle while under the influence of alcohol or illicit drugs.
- 4.9. No driver shall allow any other Fleet driver to operate an assigned Fleet vehicle without his/her supervisor's approval. No other persons (non fleet drivers) may be permitted to operate the vehicle without the prior written permission of the Fleet Safety Coordinator.
- 4.10. No employee shall use or permit use of an assigned vehicle in any unauthorized manner.
- 4.11. No driver may operate a Fleet vehicle with identified unsafe conditions. All unsafe conditions must be immediately reported to his/her supervisor.
- 4.12. Each driver must report every crash and property damage incident involving the Fleet vehicle to his/her supervisor within one workday. Immediate notice is required in all cases involving bodily injury, regardless of how slight.
- 4.13. No employee shall falsify, withhold, or suppress any Fleet related reports or information.
- 4.14. Each driver must remove the ignition key and lock all doors on his/her assigned Fleet vehicle whenever it is left unattended and unsupervised.
- 4.15. No employee shall refuel a Fleet vehicle with the engine running, or smoke near any vehicle which is being refueled or serviced.
- 4.16. No driver shall prematurely leave the scene of a crash involving the driver or vehicle being operated, except temporarily to summon police or medical assistance.
- 4.17. No employee shall cause physical damage to a Fleet vehicle, or allow physical damage or loss to occur by his/her failure to act.
- 4.18. Fleet vehicles must be properly registered and inspected for operation upon streets or highways. Golf carts, utility vehicles or other equipment not specifically designed for street use must be operated on ENTITY grounds and sidewalk areas only.

## **5. VEHICLE OPERATION & MAINTENANCE**

- 5.1. ENTITY vehicles licensed for operation on public roads are required to be serviced and maintained in accordance with Fleet Services guidelines. Every vehicle must undergo an annual inspection by the Fleet Services. If authorized by Fleet Services, ENTITY departments with dedicated, full-service vehicle maintenance facilities with trained staff may provide services, maintenance and inspections in compliance with this policy.

- 5.2. The annual vehicle inspection shall focus on areas of the vehicle which directly affect its safe operation including steering, tires, brakes, glass, lights, emissions system and horn. The inspector will provide a written, signed report of the areas/equipment /items inspected, including the date, name of facility and inspector, vehicle make/model and identification number, mileage, and notations of operating deficiencies. Provided the vehicle has no operating deficiencies it shall be deemed to have passed the inspection and may be returned to normal usage. Correction of any operating deficiency must be completed within seven calendar days of the inspection. Repairs are to be performed at Fleet Services' maintenance facility or as otherwise approved in this policy. After correction of deficiencies, the vehicle must pass re-inspection.
- 5.3. Fleet Services guidelines for vehicle service and maintenance include complying with manufacturer's service recommendations, using recommended types of gasoline; maintaining proper fluid levels (oil, antifreeze coolant, brake and transmission, etc.) and ensuring proper tire pressure; working signals, lights (headlamps, turn-signal lights, tail-lights, brake-lights, etc.), brakes, and other vehicle safety items.
- 5.4. Failure to comply with the service, maintenance and inspection requirements of this program may result in suspension of driving privileges, increased insurance charges, and/or loss of the vehicle.

## **6. PROGRAM ENFORCEMENT**

- 6.1. Policies and procedures outlined in the ENTITY Employee Handbook(s) will be used to implement disciplinary action.
- 6.2. The Personnel Services Department and the Operating Unit Manager must be informed in writing when any disciplinary action is undertaken relating to the Fleet Safety Program.
- 6.3. All written warnings or suspensions of operating status will be approved by the Fleet Safety Coordinator, prior to their issuance to the driver.

## **7. CRASH REPORTING**

- 7.1. Each Fleet Driver is required to report every crash and property damage incident involving a Fleet vehicle as noted above in Section F10.
- 7.2. Each Fleet vehicle has been provided an accident reporting kit by Clear Risk Solutions, which should be completed at the crash scene.
- 7.3. In the event of a crash involving a Fleet vehicle:
- 7.4. Dial local law-enforcement authority to report the crash. Dial 911 first, then "0" if 911 is not available.

- 7.5. Be prepared to give your name, a description of the crash location, cross-streets or local landmarks to help locate the scene, a brief description of the crash, a brief description of any injuries and the location from which you are calling. Remain calm and stay on the line - let the dispatcher terminate the call.
- 7.6. As soon as possible, telephone the **ENTITY ADMINISTRATION** to report the crash or gain assistance in completing any accident reports or paperwork.
- 7.7. Drivers should not discuss crashes with anyone except ENTITY managers and representatives of our insurance entity or their attorneys, or investigating Police Officers.
- 7.8. Each Fleet driver must immediately notify his/her supervisor of all crash related contacts by representatives of other insurance companies or their attorneys or by any "outside" investigators.

## **APPENDIX A**

### **ENTITY SAFE DRIVER PROGRAM**

The core of the Safe Driver Program is the use of the Clear Risk Solutions Safe Driver Presentation, available for on-site presentation by calling 800-407-2027, ask for Lori Sieverkropp.



## **APPENDIX B**

### **LIST OF ELIGIBILITY REQUIREMENTS FOR NEW FLEET DRIVERS**

Candidates for fleet driving assignments will not be deemed acceptable if any of the following conditions exist:

1. Falsification or omission of personal or fleet information, including experience, crashes and driving violations.
2. If driving privileges were either temporarily or permanently revoked, suspended, withdrawn or denied at any time during the past three years.
3. Conviction, or pleading guilty to, or forfeiture of bond or collateral for operating a vehicle while under the influence of alcohol, a narcotic drug or its derivatives, an amphetamine or its formulations, or any other illicit drugs.
4. Conviction, or pleading guilty to, or forfeiture of bond or collateral for vehicle hit and run or leaving the scene of an accident involving personal injury or death.
5. Confirmed clinical or admitted diagnosis of alcoholism, coupled with current use of alcohol or confirmed use of illicit drugs.
6. A record of three or more moving violations in the previous twelve months or a total of five or more during the previous three years.
7. A record of three or more preventable vehicle crashes or property damage or loss incidents in the previous twelve months or a total of five or more during the previous three years.
8. Any physical or mental condition which may interfere with the safe operation of a motor vehicle. In making this determination, the ENTITY will take into account whether reasonable accommodations for the proposed driver would correct the potential safety concern.

## **APPENDIX C**

### **EMPLOYEE/VOLUNTEER VEHICULAR TRAVEL ON ENTITY BUSINESS**

1. Employees driving their own automobile while traveling on business within the scope of employment for the ENTITY would be covered by worker's compensation for bodily injury to the employee. Entities should verify all drivers have valid operator's licenses without restrictions.
2. Damage to the employee's personal vehicle while traveling on business within the scope of employment for the ENTITY would be covered by the employee's own insurance as primary coverage.
3. Injuries to other persons or damage to others' vehicles would be treated for insurance purposes in most cases with the employee's insurance as primary coverage and the ENTITY's insurance as excess coverage with the potential in some circumstances to drop down as primary coverage.
4. The duty to defend the employee if the employee were sued would typically belong to the appropriate insurance carrier as described above.
5. Volunteers are generally covered by the ENTITY's general liability policy for bodily injury or property damage caused to third parties arising out of their activities in the course of ENTITY-sponsored volunteer work.
6. Although the ENTITY does not provide health insurance to volunteers, the ENTITY's general liability coverage may respond to situations where the volunteer himself or herself is injured in the course of volunteer work where the ENTITY was negligent in some fashion.

## APPENDIX D

### DRIVING RECORD CERTIFICATION REPORT

**Instructions to new employees, or new Fleet drivers:** Please list the information requested below for the last three (3) years and promptly return the completed report to your manager or the individual who gave it to you.

**Instruction to current Fleet drivers:** Please list the information requested below for the period:

Date \_\_\_\_\_

Return this form to your supervisor not later than \_\_\_\_\_.

#### MOTOR VEHICLE ACCIDENTS

Include all crashes in which you were involved regardless of the ownership of the vehicle.

Accident Date	Description of Accident	Injuries

#### MOTOR VEHICLE VIOLATIONS

List all violations of motor vehicle laws or ordinances (exclude Parking Violations) for which you pleaded guilty, were convicted, or forfeited bond or collateral. Include all citations currently pending disposition.

Date	Jurisdiction Description of Offense	Fine/Penalty

I certify all pending violations or citations are included and the above is true and accurate to the best of my knowledge.

Driver's License Number	State	Expiration Date
Print Name	Signature	Date

Report reviewed by Fleet Safety Coordinator	Date
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## APPENDIX E

### MOTOR VEHICLE-RELATED INJURY FACTS

According to the National Safety Council, motor vehicle-related injuries continue to be the leading cause of accidental injuries in the United States.

Leading Causes of Unintentional Injury Deaths United States, 2002	
Motor Vehicle	44,000
Poisoning	15,700
Falls	14,500
Suffocation by Inhalation or Ingestion of Food or Other Object	4,200
Drowning	3,000

Source: National Safety Council <sup>1</sup>

#### Deaths and Injuries on the Road

- There is a death caused by a motor vehicle crash every 12 minutes; there is a disabling injury every 14 seconds.
- Motor vehicle crashes are the leading cause of death for people ages 1 to 33.
- The age groups most affected by motor vehicle crashes are 15-24 and 75+.
- There were an estimated 5,700 pedestrian deaths and 80,000 injuries.
- Walking in the roadway accounted for only 10% of all pedestrian deaths and injuries.
- About 3 in every 10 Americans will be involved in an alcohol-related traffic crash at some time in their lives.
- Bicycling resulted in about 700 deaths in collisions with motor vehicles.

#### Death Trends

- Motor vehicle-related deaths increased 1% from 2001 to 2002.
- The 2002 mileage death rate of 1.56 was down 1% from 2001 and the lowest rate on record. (Mileage death rate: the number of fatalities per 100 million vehicle-miles of travel)

#### Recommendations to Reduce Motor-Vehicle Deaths and Injuries

- Strengthen seat belt laws nationwide.
- Parents and caregivers should make certain children are properly buckled in age-appropriate safety seats.
- Child safety seats reduce fatal injury by 71% for infants less than 1 year old and by 54% for children 1 - 4 years old.

Every state should enact graduated licensing laws. Graduated licensing laws allow all novice drivers to gain critical experience behind the wheel in lower risk settings before driving in more difficult environments. Motor vehicle crashes are the leading cause of death for teenagers.

**Costs of Motor-Vehicle Crashes**

The calculable costs of motor-vehicle crashes are wage and productivity losses, medical expenses, administrative expenses, motor vehicle damage, and employer costs. In 2002, the costs of all these items for each death (not each fatal crash), injury (not each injury crash), and property damage crash were:

Death	\$1,090,000
Nonfatal Disabling Injury	\$39,900
Property Damage Crash (including non-disabling	\$6,200

To estimate the costs of motor-vehicle crashes which occur while on the job, see Costs of Other Injuries below.

Expressed on a *per death* basis, the cost of **all** motor vehicle crashes, i.e. fatal, nonfatal injury, and property damage, was \$5,520,000. This includes the cost of one death, 52 nonfatal disabling injuries, and 380 property damage crashes (including minor injuries). This average may be used to estimate the motor-vehicle crash costs for a state provided that there are at least 10 deaths and only one or two occurred in each fatal crash. If fewer than 10 deaths, estimate the costs of deaths, nonfatal disabling injuries, and property damage crashes separately.

**Motor-vehicle injuries by severity**

Estimates are given here of the 2002 costs by severity of injuries, as defined in sections 2.3.4 through 2.3.6 of the *Manual on Classification of Motor Vehicle Traffic Accidents* (Sixth Edition) ANSI Standard D16.1-1996. These injury severity designations are sometimes referred to as class "A," "B," and "C."

Incapacitating Injury (A)	\$52,100
Non-incapacitating Evident Injury (B)	\$17,200
Possible Injury (C)	\$9,800

These estimates may be helpful for cities and states which do not use the concept of “disabling injury” (see definitions). Estimates used for deaths or property damage crashes are not changed by using these estimates.

**Cost-benefit analysis**

The figures above are appropriate for measuring the economic loss to a community resulting from past motor-vehicle crashes. They should not be used, however, in computing the dollar value of future benefits due to traffic safety measures because they do not include the value of a person's natural desire to live longer or to protect the quality of one's life. That is, the economic loss estimates do not include what people are willing to pay for improved safety. Recent work has been done to create the necessary theoretical groundwork and empirical valuation of injury costs under the “willingness to pay” or comprehensive cost concept. Estimates in the following section are based on the comprehensive cost concept and should be used for cost-benefit analyses wherever feasible.

**Comprehensive costs of motor-vehicle crashes**

In addition to the economic cost components listed above, the following comprehensive costs also include a measure of the value of lost quality of life which was obtained through empirical studies of what people actually pay to reduce their safety and health risks. In 2002 the average comprehensive costs on a *per injured person* basis were:

Death	\$3,470,000
Incapacitating Injury	\$172,000
Non-incapacitating Evident Injury	\$44,200
Possible Injury	\$21,000
No Injury	\$2,000

Since the lost quality of life figures, which are included in the above comprehensive costs calculations, do not represent real income not received nor expenses incurred, they should not be used to determine the pure economic impact of past crashes.

## APPENDIX F FLEET SAFETY GUIDELINES CHECKLIST

Company Name	Date:		
Safety Coordinator			
<b>Management</b>	<b>Y</b>	<b>N</b>	<b>NA</b>
Written Fleet Safety Policy			
Communicated			
<b>Driver Selection</b>			
Job Description			
Application Form			
Interview			
References Checked			
MVR's/Records			
Pre-placement Physical Exam			
Written Tests			
Driving Tests			
Valid License			
<b>Driver Training</b>			
Orientation			
"Student" Trips			
On-Going Training			
<b>Supervision</b>			
Supervisors Accountable			
Communication Kept Open			
Supervisor Training			
<b>Crash Investigations and Records</b>			
Crashes Investigated			
Crashes Reviewed Analyzed			
Crash Records Maintained			
Crash Review Committee			
<b>Maintenance</b>			
Equipment Specifications			
Planned Program			
Records			
<b>Motivation/Recognition</b>			
Driver Recognition			
Award Program			

# APPENDIX G

## PRE-TRIP SAFETY CHECKLIST

The person driving the vehicle is to complete this form.  
Form must be completed before driving the vehicle.

Vehicle #	Year	Make Model	VIN#:
Date	Mileage	Work Ticket	Driver's Name

### Approved Drivers List

Driver is on the current list of approved drivers for the entity.	Coordinator's Signature	Date
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Item	OK	Comments
Body of Vehicle		
Tires: Condition & Air Pressure		
Horn		
State Inspection & Registration Sticker		
Oil Level on Dipstick		
Radiator Fluid Level		
Brake Fluid Level		
Transmission Fluid Level		
Power Steering Fluid Level		
Belts and Hoses		
Wipers and Fluid Reservoir		
Low & High Beam Headlights		
Brake Lights		
Turn Signal Lights		
Emergency Flasher Lights		
Vehicle Insurance Card Valid?		
Gas Tank Full		
Fire Extinguisher		
Flares		
First Aid Kit		
Accident Report Kit		

I agree to: (1) Read and follow the Pre-Trip Safety Checklist Instructions on the back of this form. (2) Require all occupants to wear seatbelts. (3) Not to drive the vehicle with luggage or other items placed above the bottom of any window frame in the vehicle.

Driver's Signature	Date
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## **PRE-TRIP SAFETY CHECKLIST INSTRUCTIONS**

This Pre-trip safety checklist was developed from research of the automotive industry’s generally accepted recommendations on items to be checked before a trip and from forms already in use by several entities. Individual entities and/or departments may wish to add to the form to meet their individual needs. **The department and individual responsible for the entity vehicles will also be responsible for maintaining a folder for both the “Pre-Trip Safety Check List,” “Vehicle Check-Out Form” and the “Vehicle Maintenance Log” (or equivalent) in their respective office.**

**INSTRUCTIONS:**

1. **Vehicle #:** This is the individual inventory or shop number for the vehicle.
2. **Year, Make & Model:** An example would be: “88 Ford F150 Pickup.
3. **VIN#:** Is the “vehicle identification number” found on a metal plate just below the driver’s side windshield or inside the doorframe of the driver’s door.
4. **Date:** Is the date that the vehicle was checked or work was done on the vehicle.
5. **Mileage:** Mileage at the time the vehicle is checked or work is done on the vehicle.
6. **Driver’s Name:** Name of Driver doing the “Pre-Trip Safety Check List”
7. **Coordinator’s Signature:** Entity vehicle coordinator signs and dates this line after checking to make sure that the driver is on the current list of approved drivers for the Entity.
8. **Driver’s Signature (Bottom of Page):** Driver signs and dates after completing Pre-Trip Safety Checklist.

**ITEMS:**

(Place an “X” under each item checked and found to be O.K.)

- **Body:** Check body of vehicle for damage. Document any damage found on vehicle.
- **Tire Inspections:** Condition & Air Pressure **(Including Spare) (Also check for Tire Jack):** Inspect the tread on the tire using a tire gauge, as well as visual inspections. **(If the tire tread is 3/11 of an inch or less the vehicle should not be driven until the tire is replaced)** Check the air pressure in the tires using an air gauge.
- **Horn:** Test vehicle’s horn
- **State Inspection/License Registration Sticker:** Check State Vehicle Inspection & License Stickers to make sure they are current.
- **Oil Level on Dipstick:** Check the oil dipstick in the vehicle. If oil is not at the full mark add the appropriate amount.
- **Radiator Fluid Level:** Check the radiator fluid level. If fluid is not at the full mark add the appropriate amount.
- **Brake fluid level:** Check the brake fluid reservoir. If fluid is outside the minimum or maximum line have the brake system checked by a qualified mechanic before driving vehicle.
- **Transmission Fluid:** Check the transmission fluid dipstick. Add transmission fluid as needed.
- **Power Steering Fluid Level:** Check the power steering dipstick in the vehicle. If fluid is not at the full mark add the appropriate amount.
- **Belts and Hoses – Condition:** Check belts and hoses. Replace worn or damaged belts and/or hoses as needed.
- **Wipers and Fluid Reservoir:** Check wiper blades on windshield. Replace if worn or damaged. Add washer fluid as needed.
- **Low & High Beam Headlights:** Check high and low beams on headlights. Replace lamps as needed
- **Brake lights:** Check brake lights. If brake light is out replace bulb or fuse as needed.
- **Turn signals:** Check signal lights. If signal light is out replace bulb or fuse as needed.
- **Emergency Flashers Lights:** Check emergency flashers. If flasher is out replace bulb or fuse as needed.
- **Vehicle Insurance Card Valid:** Is the vehicle’s insurance card valid?
- **Gas Tank Full:** Is the gas tank full?
- **Fire Extinguisher:** Is extinguisher fully charged?
- **Flares:** Is the set number of flares in the vehicle?
- **Emergency Instructions:** Envelope in vehicle will contain things such as the accident form and a list of things to do after an accident.

When the driver finds a problem such as low fluid level in the **brake reservoir the vehicle will not be driven until checked by a qualified mechanic. The driver will need to make other arrangements for a vehicle.**

## APPENDIX H

# 12,000 MILE SAFETY INSPECTION AND PREVENTATIVE MAINTENANCE SERVICE FORM

*Perform yearly if vehicle runs fewer than 12,000 miles per year.*

Vehicle #	Date	Odometer
Make	Year	Model
License	VIN	Technician
<b>PART I — ENGINE AND BRAKE EVALUATION</b>		
<b>ITEM</b>	<b>OK</b>	<b>COMMENTS</b>
Inspect Condition of Brake Lining and Wheel Cylinders	<input type="checkbox"/>	
<b>PART II — MINOR ENGINE TUNE</b>		
<b>IGNITION TUNE-UP (if necessary)</b>		
Clean and tighten battery terminals.	<input type="checkbox"/>	
Clean or replace and adjust spark plugs.	<input type="checkbox"/>	
Replace fuel filters	<input type="checkbox"/>	
Check operation of manifold heat controls (if equipped).	<input type="checkbox"/>	
<b>SERVICE EMISSION SYSTEM</b>		
Clean PCV valve and lines.	<input type="checkbox"/>	
Check tension of all drive belts; adjust if necessary.	<input type="checkbox"/>	
Check operation of all lights, instruments and gauges	<input type="checkbox"/>	
<b>PART III — MECHANICAL</b>		
Vacuum dust from drums and brake assemblies.	<input type="checkbox"/>	
Replace wheel cylinders showing signs of leakage.	<input type="checkbox"/>	
Replace brake lines or hoses showing signs of leakage	<input type="checkbox"/>	
Repack wheel bearings, adjust brakes.	<input type="checkbox"/>	
<b>VISUAL INSPECTION OF:</b>		
Exhaust System	<input type="checkbox"/>	
Rear Axle and Transmission for grease seal leaks.	<input type="checkbox"/>	
Cooling system, radiator core, freeze plugs, hoses and water pump	<input type="checkbox"/>	
Fuel system for leaks.	<input type="checkbox"/>	
Condition of tires.	<input type="checkbox"/>	
Engine oil leaks.	<input type="checkbox"/>	
Suspension system, tie rod ends, steering.	<input type="checkbox"/>	
Engine mountings.	<input type="checkbox"/>	
Seat belts and shoulder harness for cuts, tears, or damage to webbing, buckles, or attachments.	<input type="checkbox"/>	
<b>PART IV — ROAD TEST</b>		
Operation of Brakes	<input type="checkbox"/>	
Unusual Noises	<input type="checkbox"/>	
Transmission Slippage	<input type="checkbox"/>	
Drive Shaft	<input type="checkbox"/>	
Reviewed by Motor Vehicle Inspector		Date

## APPENDIX I VEHICLE SERVICE RECORD

Vehicle #	Make	Model	Year
<b>Date &amp; Mileage                      Nature of Repairs                      Technician                      Costs</b>			