



# CONSIDERATIONS FOR A VEHICLE FLEET SAFETY PROGRAM

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*Recommendations & guidelines to help keep  
your organization's fleet on the right track.*



# We're here to help keep your organization on-mission and moving toward its goals.

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Although your organization's purpose statement might not describe it, you are – at some level – in the transportation business. Whether your fleet has one vehicle or dozens, each of your vehicles and drivers represent both an investment and a risk. Your commitment to transportation safety will help to keep your resources focused on making positive change possible in your community.

## *HOW A VEHICLE FLEET SAFETY PROGRAM CAN BENEFIT YOUR ORGANIZATION*

While financial losses arising out of vehicular accidents may be covered to an extent by insurance, there may be several other factors or indirect costs not included in your coverage, such as:

- + Loss of use of the vehicle while it's being repaired
- + Injury to passengers or damage to stock or equipment in transport
- + Replacement of injured drivers
- + Hiring and training of new drivers
- + Time lost during accident investigation and completion of reports and forms
- + Orders that are delayed or canceled with loss of good will and business
- + Unusual clerical time and expense
- + Increased insurance rates as a result of the accident

These unnecessary and wasteful costs can greatly reduce the efficiency of your organization. However, you can manage all of them through an effective fleet safety program organized and tailored to fit your organization's particular needs.

To help you and your organization as you establish a comprehensive safety program, our risk management experts at GuideOne Insurance have compiled decades of experience, effective guidelines and real-world examples.

## *PARTS OF A COMPREHENSIVE FLEET SAFETY PROGRAM*

When deciding on the type of fleet safety program to introduce, management should consider the following factors: the size of the fleet, the type of operations and the geographical area covered by your operations. Each of these items and more will be discussed so you can be better equipped to address the needs of your organization's fleet.



# Contents

|                                                                                      |    |
|--------------------------------------------------------------------------------------|----|
| Written and communicated management fleet safety policy statement .....              | 4  |
| General policy statement .....                                                       | 4  |
| Designation of the individual responsible for supervision of the fleet program ..... | 4  |
| Personal Use of Company Vehicles .....                                               | 5  |
| Using Personal Vehicles for Organization Business .....                              | 6  |
| Electronic Device Policy .....                                                       | 6  |
| Seat Belt Use .....                                                                  | 6  |
| Driver Fatigue .....                                                                 | 6  |
| New driver screening and selection .....                                             | 7  |
| Who Is Authorized to Drive .....                                                     | 7  |
| Driver's License .....                                                               | 7  |
| Motor Vehicle Records check .....                                                    | 7  |
| Road Test .....                                                                      | 8  |
| Drug and Alcohol Screening .....                                                     | 8  |
| Driver Training .....                                                                | 8  |
| Orientation Training .....                                                           | 8  |
| Periodic or New Equipment Training .....                                             | 8  |
| Special Training Exposures .....                                                     | 9  |
| Accident reporting, review and analysis .....                                        | 9  |
| Responsibilities following an accident .....                                         | 9  |
| Driver and accident records .....                                                    | 10 |
| Driver Files .....                                                                   | 10 |
| Accident Files .....                                                                 | 10 |
| Vehicle inspection and maintenance .....                                             | 11 |
| Vehicle Inspection .....                                                             | 11 |
| Vehicle Maintenance .....                                                            | 11 |
| Safety Culture .....                                                                 | 12 |
| Review of the fleet safety .....                                                     | 12 |
| Appendix A - Sample Management Policy Statements .....                               | 14 |

## WRITTEN & COMMUNICATED MANAGEMENT FLEET SAFETY POLICY STATEMENT

Any safety or loss control program must have top management's full support, as these individuals will be responsible for controlling and directing the program, establishing the policy under which it wishes to operate and setting the goals its operations will strive to achieve.

### *General Policy Statement*

All drivers – whether they are employees, volunteers or others – must fully understand what is expected of them under the fleet safety program. Management's fleet safety policy statement to drivers is the foundation for this understanding.

All fleet safety programs should begin with management's statement of fleet safety policy, which should be formally communicated to all drivers. Contents of this policy will depend on the scope of the fleet safety program, but at minimum, the policy should clearly state the following:

- + Management's fleet safety policy
- + The goals for the program
- + Details on how the program will be carried out
- + The individual who has been designated to have day-to-day operating responsibility and authority for the program

### *Designation of the Individual Responsible for Supervision of the Fleet Safety Program*

Proper direction of a fleet safety program is of first importance if a reduction in accidents and related costs is to be expected. Efficient operation is the responsibility of management. For this reason, it is important to delegate one individual with authority to properly administer the fleet safety program's functions. This person should be allowed enough time in their workday to properly coordinate the program.

It is also important for the designated coordinator to inform and instruct supervisors in the duties and responsibilities of interpreting the fleet safety program to those working under their supervision.

A fleet safety program may become unsuccessful when supervisors fail to assume their responsibility for accident prevention and are not held accountable for that failure. When any supervisor knowingly allows any driver to violate the rules – and such violation leads to an accident – that supervisor is more responsible for the accident than the driver.



### *Sample Policy: Personal Use of Company Vehicles*

If personal-use privileges have been authorized, the employee may use the vehicle for personal purposes with the following restrictions (some possible restrictions may include):

- + Establish mileage limits for personal use
- + Prior approval should be required for each trip beyond a certain radius of employee's home
- + No towing of trailers or any other vehicles
- + No off-road use
- + Only driven by assigned driver
- + Spouse's use (must conform to same MVR criteria for acceptability)
- + No children under the age of 21 years may drive

## *Using Personal Vehicles for Organization Business*

If personal vehicles are to be used for the organization's business, the vehicles and the drivers should be treated as if they are using vehicles owned by the organization. Before allowing employees to use personal vehicles for business purposes, the organization will need to:

- + Review and develop an acceptable level of insurance it will require employees to maintain on their vehicles
- + Request and keep on file current proof of insurance before allowing employees to use personal vehicles for company business
- + Require that employees maintain their personal vehicles in a safe condition

## *Sample Policy: Electronic Device Policy*

It is the policy of this organization that cell phones, computers, or any other equipment that requires the driver to divert his or her attention from driving will not be used while driving on organization business. If calls must be made, the driver should pull over at the first safe opportunity.

## *Sample Policy: Seat Belt Use Policy*

Our policy is that seat belts will be used at all times by all occupants of an organization vehicle or any vehicle being used for our organization's business.

## *Driver Fatigue*

Driver fatigue is a significant contributor to accidents. Drivers who feel fatigued need to take actions to ensure they are not putting themselves or others in danger.



## NEW DRIVER SCREENING & SELECTION

Efficient fleet operation requires the proper screening and selection of qualified drivers. Incompetent drivers may cause unnecessarily high operating costs, delay service to customers and harm public relations. With this in mind, it is crucial that adequate information is obtained concerning a driver applicant's background, ability and mental attitude.

### *Sample Policy: Authorized Drivers*

Our organization has two levels of driving responsibilities:

- + Jobs where driving is a routine and significant part of an employee's duty
- + Occasional drivers who may run errands or make trips that are otherwise incidental to their primary job duties

In either case, only employees who have been properly screened and given authority to drive may drive on behalf of the organization. This applies to vehicles controlled by the organization and employee-owned vehicles used for any organization business.

### *Driver's License*

Each applicant must have a valid driver's license. The license should be appropriate for the type of vehicle the applicant will be driving.

### *Motor Vehicle Records Check*

Some of the best indicators of a driver's attitude and ability are previous experience and past driving record. It is recommended that motor vehicle reports from the State Department of Motor Vehicles – or the DMV counterpart in your state – be obtained and reviewed regularly for all drivers (subject to applicable privacy laws in a given jurisdiction). The driver applicant should also be required to provide references and a record of previous employment, and these should be thoroughly checked.

The screening and selection process can be made simpler if driver qualifications and requirements are made a part of the driver's position description. A detailed, accurate job description can help make sure that persons hired for driving positions have the proper qualifications for the position.

## *Road Test*

All new hires and newly assigned drivers should be given a road test prior to final assignment. An authorized member of management should provide the road test and document the employee's driving skills in the vehicle the individual is expected to drive. Issues that arise during the observation may result in mandatory attendance in a driver training course.

## *Drug and Alcohol Screening*

Fleet safety policies should prohibit operating a company vehicle or personal vehicle for company business while under the influence of alcohol or any mind-altering or fatigue-symptom inducing substance, including illegal, prescription and over-the-counter substances. The policy should also describe any [drug testing measures](#).

## **DRIVER TRAINING**

### *Orientation Training*

Proper orientation and training are essential to the success of a new driver. Fleet orientation training should be designed to help ensure new drivers:

- + Understand organization policies
- + Are familiar with the type of vehicles and equipment they will be using
- + Are familiar with any route peculiarities they may encounter
- + Know defensive driving
- + Avoid [distracted driving](#)
- + Are aware of cargo considerations

### *Periodic or New Equipment Training*

To address accident or incident trends, new equipment or changes in fleet operations, your organization should require drivers to attend periodic trainings.

## *Special Training Exposures*

The following are special exposures that may be found in your fleet. Drivers should complete training based on the type of vehicle they drive, the cargo they transport and any conditions they must operate under.

- + [Use of 15-passenger vans](#)
- + [Transportation of disabled passengers including the use of wheelchairs](#)
- + Night-time driving
- + [Extreme driving conditions](#)
- + [Interaction with deer](#)



## **ACCIDENT REPORTING, REVIEW & ANALYSIS**

It is essential that each driver be properly instructed in the procedures to follow in the event of an accident, including the proper completion and submission of an accident report.

An accident report should be completed by the driver involved in the accident and submitted to the organization's administrative office as soon as possible after the accident. A copy of the accident report can be used by an accident review committee and for your operation's driver records.

### *Responsibilities Following an Accident*

If future accidents are to be prevented, it is necessary to establish a procedure to review accidents and learn their causes and corrections. You may find it beneficial to organize an accident review committee, so that each accident can be analyzed to decide whether it was preventable based on stated operations policy and recognized defensive driving rules. In this review process, the committee should have a copy of the completed driver's accident report available.



## DRIVER & ACCIDENT RECORDS

Maintaining accurate driver and accident records is necessary to gain full value from a fleet safety program. These records can assist in the evaluation of the success of the program by helping supervisors and accident review committees determine specific problem areas and appropriate corrective actions to take. They can also be used to show which drivers exhibit consistently poor driving records.

### *Driver Files*

Your organization should maintain complete and accurate records of each drivers' performance. This information should be kept separate from other personnel records or files to preserve the privacy of that information from unauthorized access. Periodic rechecks after hiring are critical to the overall management of the fleet program. All drivers should immediately report any license suspensions or revocations as well as convictions for vehicle-related offenses. Violations of fleet policies should be treated the same as violations of company safety rules.

### *Accident Files*

Accident records should – at minimum – include the following:

- + Minutes of each accident review committee meeting, along with a copy of each accident report reviewed and the committee's decision on each accident.
- + Driver's accident and violation record form or card.

## VEHICLE INSPECTION & MAINTENANCE

A vehicle inspection and preventive maintenance program should be established to assure that all vehicles are maintained and are operating safely. Not only is such a program worthwhile in preventing accidents, it can also save extra expenses caused by breakdowns, missed pickups and deliveries, temporary vehicle rental, etc.

### *Vehicle Inspection*

At least for certain commercial and passenger-carrying vehicles, a program of inspection and maintenance is required by federal and state laws.

A [vehicle inspection checklist](#) should be provided to drivers to aid in inspecting the vehicle on a regular basis.

### *Vehicle Maintenance*

An effective preventive maintenance program is one of the surest ways to save money and increase efficiency in vehicle operations. Preventative maintenance such as tire rotations, regular oil changes, tire pressure and fluid checks, will help to ensure you have a reliable, safer vehicle to use for your organization.

Preventative maintenance should be completed on your vehicle following the guidelines of the manufacturer. Repairs should be performed by authorized repair facilities.

A system should be developed to report vehicle repair needs by drivers to prompt timely reporting of vehicle faults or problems. If necessary, this system should also be the basis for pulling vehicles out of service.

There should be a system of maintaining accurate repair and maintenance shop records of the work done on vehicles. Often, some method of recording this information on a computer is helpful in streamlining this aspect of the maintenance program.

## SAFETY CULTURE

There are a variety of educational materials and ideas available on fleet safety designed to help in the promotion of a fleet safety program. Often, these are low to no cost items. The important part is to do whatever it takes to keep fleet safety in front of drivers at all times. Drivers with continual safety awareness are the hallmark of an effective fleet safety program.

Some examples of materials you may want to seek out for your fleet safety program include:

- + Safe driving signs and posters displayed where drivers congregate
- + Safe driver booklets and pamphlets distributed to drivers
- + Driving safety videos featured in safety meetings
- + Safe driving records included in performance reviews for all drivers and their supervisors and managers who are responsible for the effectiveness of the fleet safety program

Another area that can be of great benefit at generally low cost is a safety bulletin board. This board should be located so that it will be seen by all drivers daily and should be reserved for safety materials, safety posters and other safety messages specifically affecting the fleet safety program.

### *Organizing Driver Safety Meetings*

Driver safety meetings that include all drivers can be an excellent method for helping to maintain driver interest in the fleet safety program. However, these meetings should include an opportunity for driver participation. Meetings should always be based on a definite theme that will be of interest to the drivers and will tie in with the benefits of maintaining a good driving record.

### *Review of the Fleet Safety*

As with any aspect of your operation, fleet safety programs should be regularly evaluated to make sure they are on track and are getting the right results. This process allows modifications to be made to the program to keep it operating at top efficiency and as cost-effectively as possible.

This type of review can usually be done annually and should involve the top management person ultimately accountable for the success of the program.



## APPENDIX A - SAMPLE MANAGEMENT POLICY STATEMENTS

To All Drivers:

We have decided to improve the safety of the operation of our vehicle fleet. We fully recognize that you, as a driver, play a key part in our mutual effort to reduce death, injuries and property damage accidents involving vehicles.

In order to help you do a better job, we are initiating an improved fleet safety program. It is designed to promote safety awareness and describe the part each of us plays in a continuing accident prevention program. This is a part of professionalism.

I am personally taking charge of the fleet safety program to promote more effective results. (Name of person being given responsibility and authority to operate the program on a day-to-day basis) will be responsible for carrying out the details of a complete fleet safety program and will be available to help each of you in performing your job safely.

I solicit your help and want you to be constantly alert to the hazards of your driving job or activities. Follow instructions and avoid the "thoughtless acts" that might cause you, or your fellow drivers, to be involved in an accident.

Don't hesitate to bring in safety suggestions to your supervisor. It is only with your help that we will be able to increase our fleet's safety.

Additional information will be forthcoming to explain the details of our new, improved fleet safety program.

Everyone benefits when we stop accidents.

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(Signature of top-level manager, owner, president, etc.)

**To all organization drivers:**

Vehicle accidents can cause serious injury and undue hardships for yourself and others. It is the policy of (your organization name) to achieve the greatest practical freedom from accidents and to provide every organization driver with safe, healthy working conditions. We have begun a fleet safety program to reduce and prevent vehicular accidents. We will, as always, comply with all applicable regulations and expect all drivers to drive safely and obey traffic laws. Safety is a priority. Your cooperation and help are needed to make our program a success.

President/Owner

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