

# Fleet Safety Best Practice Matrix

This resource is intended to be used as a tool to score a fleet safety program. There are 10 sections in the matrix, each with 4 individually scored columns. Each section is evaluated and scored to determine the overall rating of the safety program: Excellent, Good, Basic, or Poor.

Each section has its own point totals, weighted by degree of importance to the overall fleet safety program. The more critical the section, the higher the available points.

*Disclaimer: This resource is intended to be used as a tool. Western National does not guarantee that this resource is or can be relied on for compliance with any law or regulation, prevention against preventable losses, or void you from any legal liability. Western National will not be liable for the use of this resource. All safety program and policies, including this matrix and the information you supply to complete it, should be reviewed by your legal counsel and/or risk management staff.*

**Instructions:** Select the description that most accurately describes the components of the fleet safety program for each topic. Enter the corresponding Evaluation Score into the Area score. To total the score, right click in the Total Points box and click update. All sections must be completed to give a valid score.

|  |  |
| --- | --- |
| Account Name  | Policy/Group#  |
| Loss Control Consultant P Clark  | Date Completed  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Total Points:** | **Rating:** |  |  |  |
| 80-100 points | Excellent |  |  |  |
| 55-79 points | Good |  |  |  |
| 35-54 points | Basic |  |  |  |
| 0-34 points | Poor |  | **Total Points:** |  0 |
|  |  |  |  |  |
|  |  |  |  |  |
| **FLEET SAFETY PROGRAM COMPONENTS** |  |  |
| **Evaluation Score: 15 points****10 points**  | **10 points**  | **5 points**  | **0 points** |
|  | **Excellent**  | **Good** | **Basic** | **Poor** |
| **Management Commitment** | * Upper management directs fleet safety program
* A qualified fleet safety manager leads program
* Formal written fleet program in place
* Requires feedback on fleet program
* Annual Fleet safety budget established for fleet replacement, maintenance
 | * Written fleet safety program in place
* Mid-level HR manager leads program
* Requires feedback on fleet safety program
* Annual budget has fleet safety funds, but not based on planned activity
 | * Informal fleet program
* Fleet program managed on a part- time basis
* Money taken from general funds for fleet safety
* Informal feedback only
 | * Responsibility not assigned
* No budget for fleet program
* No program feedback sought
 |
|  |  |  | **Area score:** |  |
|  | **10 points** | **7 points** | **4 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Driver Selection** | * Job application and background check
* New & existing driver annual MVR review
* Written MVR acceptability criteria
* 2+ years of prior truck driving experience required
* New driver safety orientation program
* Driver road testing and observation
 | * Job application required
* New & existing driver annual MVR review
* New driver safety orientation
* New driver road testing
* Hires drivers with at least 2 years trucking experience
 | * New & existing driver annual MVR review
* Job application
* Hires drivers with 1 year or less experience
 | * New driver MVR review
* Inexperienced drivers hired
* No road testing
* No existing driver MVR review
 |
|  |  |  | **Area score:** |  |
|  | **10 points** | **7 points** | **4 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Substance Abuse Policy** | * Written compliant policy with strict rules on drug and alcohol use
* Drug testing at hire, random and post-accident
* Reasonable cause drug testing
* Supervisors trained in alcohol and drug awareness

ny  | * Written drug testing program
* At hire drug testing
* Post-accident testing
* Random drug testing
 | * Accepts existing CDL medical card at hire
* Does not require drug testing unless medical card expired
 | * No drug testing policy
 |
|  |  |  | **Area score:** |  |
|  |  |  |  |  |
|  | **14 points** | **9 points** | **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Driver Training** | * New driver safety orientation period
* Formal defensive driver training program based on fleet loss history
* Interactive fleet safety training modules
* Monthly safety communications
* Road observation reports
* Fleet driver rodeo competition
 | * Annual accident trend based driver training
* Quarterly safety communications
* Road Observation reports
* Fleet safety incentive program
 | * Safety training conducted infrequently
* Safety training & communication programs are informal
 | * No fleet safety training conducted
 |
|  |  |  | **Area score:** |  |
|  | **8 points** | **5 points** |  **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Accident Investigation** | * Drivers trained in accident reporting
* Formal investigation by fleet manager
* Driver interviewed, preventability determined, corrective action taken
* Fleet Accident review board
* Progressive disciplinary program
* Accident trend based driver training
 | * Full investigation by supervisor
* Written report that determines cause
* Management accident reviews
* Accident based driver retraining
 | * Management accident review
* Informal driver discussion
* Driver disciplined
 | * No investigation
* No action taken
 |
|  |  |  | **Area score:** |  |
|  | **10 points** | **7 points** | **4 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Vehicle Maintenance** | * Formal documented preventive maintenance program
* Experienced vehicle mechanics
* Pre-and post-trip inspections documented
* Written semi-annual vehicle inspections
* Formal vehicle deficiency reporting
 | * Formal documentation of maintenance
* Pre-and post-trip inspections conducted
* Subcontracted maintenance and repairs
* Informal vehicle deficiency procedures
 | * Informal maintenance schedule
* Driver responsible for maintenance
 | * No maintenance program
 |
|  |  |  | **Area score:** |  |
|  | **8 points** | **5 points** | **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Routing &****Scheduling** | * Planned route with dispatcher
* Truck equipped with GPS
* Electronic log books
* No personal use of vehicle
 | * Driver planned routes
* Adequate time to make deliveries
* Driver only personal use
 | * Unplanned routes
* Driver and spouse use
 | * Unplanned routes with time constraints
* Unlimited personal use
 |
|  |  |  | **Area score:** |  |
|  | **8 points** | **5 points** | **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Vehicle Security** | * Fenced, illuminated, motion sensored fleet yard
* Vehicles with GPS telematic tracking systems
* CCTV and Anti-theft devices used
* No off premises vehicle storage
 | * Secure storage facility
* CCTV and centrally monitored burglar alarm
* Limited number of vehicles with off premises storage
 | * Unsecured storage
* Off premises vehicle storage permitted
 | * Storage areas subject to vandalism and theft
 |
|  |  |  | **Area score:** |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  | **9 points** | **6 points** | **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Fleet Safety Rules** | * Driver safety rules are published
* Drivers are aware of the rules
* Rules are concise and easy to understand
* Rules equally enforced among all drivers
* Rules are updated every 2 years
* Formal orientation program in effect for new and transferred drivers
 | * Rules are published
* All drivers are made aware of the rules
* Supervisors enforce most of the rules
* Orientation with new drivers includes rules review
 | * There are some general rules
* Rules are enforced most of the time
* Rules have not been updated in last 2 years
* Orientation but no records maintained
 | * There are no written driver rules
* No orientation to new drivers.
 |
|  |  |  | **Area score:** |  |
|  | **8 points** | **5 points** | **3 points** | **0 points** |
|  | **Excellent** | **Good** | **Basic** | **Poor** |
| **Recordkeeping** | * Comprehensive records kept on fleet inspections, vehicle maintenance logs, training conducted and other topics.
* Accident investigation records reviewed for loss trending analysis
* DOT regulated fleet with low BASIC scores
 | * Some records kept on fleet accident investigation, vehicle maintenance,
* BASIC scores acceptable level
 | * Driver completes fleet accident report for review with management
* Management not monitoring BASIC scores
 | * No accident reporting, documentation or investigation
 |
|  |  |  | **Area score:** |  |

**Comments:**