

Business Safety Leadership

Developing a written safety & training program

Presented by



Outline

- Components of a written program
- Mission & vision statements
- Hiring & retention criteria
- Orientation & safe work method training
- Incident & claims management
- Emergency & disaster planning
- Regulatory compliance

Overview

- **What is a Written Safety Program?**
 - A detailed document of how your business strategy and operations are affected by risk management and safety
- **Why does your business need a Written Safety Program?**
 - Provides clear communication and guidance
 - Helps to control claims and insurance costs essential for profitability and business survival
 - Aids in reducing collisions, injuries and other adverse events
 - Complies with the law and safety regulations
 - Meets the terms of your business' lease agreement
 - It's the right thing to do

Written Safety Program — Essential Elements

Tips for Writing an Effective Safety Policy

- Identify and read all applicable state and federal standards, regulations and interpretations
- Conduct a risk assessment to determine applicability, scope and exceptions
- Identify accountable, authorized and affected persons
- Define responsibility
- Develop written policy, procedures and standard operating procedures (SOP)
- Develop supporting documentation, forms and workflows
- Identify training requirements:
 - Curriculum
 - Content
 - Frequency
 - Records
- Establish:
 - Periodic policy review (annual and/or bi-annual)
 - Inspections and audit criteria

Written Safety Program — Essential Elements

A. Safety Mission and Vision Statement

- Demonstrates vision, leadership and strategy
- Outlines commitments and expectations
- Clarifies values versus priorities

SAMPLE SAFETY MISSION / VISION STATEMENT

<COMPANY NAME> IS COMMITTED TO AND WILL CONTINUALLY WORK FOR AN UNCOMPROMISED SAFETY & HEALTH ENVIRONMENT IN ALL COMPANY OPERATIONS. WE STRIVE TO INSTILL A SENSE OF PERSONAL ACCOUNTABILITY FOR INJURY, COLLISION & LOSS PREVENTION IN ALL <COMPANY NAME> ASSOCIATES.

WE BELIEVE

**ALL LOSS INCIDENTS CAN BE PREVENTED AND MANAGED.
SAFETY & COMPLIANCE MUST BE A VALUE NOT A PRIORITY**

BASIC EXPECTATIONS

As an associate of <Company Name>, I have a right and responsibility to:

- **A workplace/vehicle free of recognized and unabated hazards.**
- **Clearly defined safety procedures and safety training.**
- **Cooperate and obey safety rules, procedures and instructions.**
- **Maintain a clean workstation/vehicle.**

Stop any recognized at-risk behavior, at-risk condition or at-risk process.

Written Safety Program — Essential Elements

B. Employee/Driver Hiring Criteria

- State and federal DOT standards provide specific minimum guidance on regulated commercial drivers for both intrastate and interstate operations
- Critical that a driver's background and experience be vetted for the type(s) of vehicles to be operated
- Documentation maintained in the driver qualification file

Written Safety Program — Essential Elements

C. Employee/Driver Retention Criteria

- Disciplinary guidelines
- Recognition and reward programs
- Behavioral observations
- Periodic employee performance evaluations and driver MVR reviews (3 part process)
 - Certificate of violation
 - Motor vehicle record (MVR)
 - Manager review
- Minimum requirement annual/best practices
- Move beyond “check-the-box” compliance
- Coaching, correcting and positive reinforcement
- Ongoing training

Written Safety Program — Essential Elements

D. Orientation and Training

- Onboard workers by issuing formal policies and reviewing operations
- Ensure compliance with FMCSR and OSHA regulations
- Use a combination of written curriculum and trained instructors/driver trainers
- Focus on job-specific training and in-cab defensive driving
- Draft a new-hire checklist with worker sign-off

Fleet Safety Program Policy and Procedures

Essential Elements

Driver Orientation and Onboarding Suggested Topics

TOPICS	FMCSR Regulations
Safe/Defensive Driving (Select a quality defensive driving program)	391.11
Collision and Injury Reporting	383.31
Equipment Inspection and Maintenance	393, 396
Pre/Post Trip Driver Inspections	383.111.113; 392.7; 396.11,13
Seatbelts	391.11
Speed Limits, Space Cushions and Backing	383.111, 392.2
Distracted Driving: Phones/Texting/Mobile Devices	392.80, 392.82
Assembly of Combination Equipment	383.115; 391.11; 392.7; 393.70; 396.13
Hours of Service	395
Hazardous Materials	170-177, 395
Collision Reporting and Investigation	383.31
Substance Abuse Policy	382,392.4, 392.5
Commercial Driver's License	383.21,51; 391.11,15,27
Motor Vehicle Records Review	391.25
Physical Qualifications	391.41
New Entrant CMV Driver Training	380.503; 391; 395; 29CFR 1978
Injury Prevention and OSHA Compliance Training Topics	OSHA Standards

Written Safety Program — Essential Elements

D. Orientation and Training: Defensive Driver Training Program

- Driving is a habit intensive skill
- Drivers need to be periodically trained and evaluated
- Creates an ongoing dialogue and conversation about safe-driving behaviors
- Defensive driver training establishes the basis for preventability
- Professional drivers will recognize the need for continuous improvement

Written Safety Program — Essential Elements

E. Other Company Policies and Procedures

- Seat belt usage should be mandatory
- Distracted driving should be prohibited at all times
- Best practices for driving behavior: mirror adjustment, following distance, parking, backing, route planning, etc.
- Operational procedures including peak, special delivery, heightened awareness seasons, etc.
- Include company and/or contract-specific rules including appearance, footwear and uniform requirements, etc.
- Develop a fleet safety handbook and require employee signature upon receipt

Written Safety Program — Essential Elements

F. Loss Incident Reporting and Investigation

- Understand different types of loss. For example: collision, injury, cargo
- **Response Phase:**
 - Secure the scene
 - Assist injured persons (Good Samaritan Laws)
 - Notify company, authorities and gather information
- **Report Phase:**
 - Fact-based information who, what, when, where, why and how
- **Review and Remediation Phase:**
 - Identify immediate causes and root causes: The 5 Whys
 - Determine preventability: Defensive driving errors versus offensive driving errors
 - Define corrective actions

Written Safety Program — Essential Elements

G. Claims Management Policies

- Understand claims reporting requirements for your business' insurance carrier(s)
- Understand internal reporting requirements to motor carrier
- How to identify and flag potential fraud
- Identify strategies to return vehicles and workers back to production as quickly as possible
- Review trends to focus on priorities
- Return-to-work program for injured workers
- Communicate regularly with your insurance claims team
- Designate an incident and claims coordinator

Written Safety Program — Essential Elements

H. Emergency and Disaster Planning

Typical Catastrophic Scenarios

- Collision
- Weather related
- Natural disaster
- Systems outage

Tornado



Flood



Electrical Storm



Fire



Crash



Written Safety Program — Essential Elements

I. FMCSA/DOT Regulations

Driver Recordkeeping Requirements

- Driver qualification files
- Commercial driver license (CDL)
- Medical exam
- Driving history (MVR)
- Employment history

A DOT Medical Certificate form for Florida. The form is titled "DOT MEDICAL CERTIFICATE" and "FLORIDA". It includes a section for the driver's information, a section for the medical examiner's findings, and a section for the driver's signature. The form is dated 01/10/2013 and has a license number of SAM-67-1234. The medical examiner's findings are listed in a table with checkboxes for various conditions. The driver's signature is written in the designated area. The form is dated 01/10/2013 and has a license number of SAM-67-1234. The medical examiner's findings are listed in a table with checkboxes for various conditions. The driver's signature is written in the designated area.

Written Safety Program—Essential Elements

I. FMCSA/DOT Regulations (continued)

Hours of Service and Driver Fatigue

- The rules
 - 11,14, 60/7, 70/8, 30 in 8, 34-hour reset
 - Policy defines practices, controls and audit procedures
- Paper logs
 - Accuracy 15-minute rounding
 - Handwritten
 - Easily falsified
 - Manual audit and verification (catch and correct)
- Electronic log devices
 - Automatic
 - Precise
 - Data driven dispatch
 - Breakdown procedure workflow
 - Editing controls — driver approval, cross check

Written Safety Program — Essential Elements

I. FMCSA/DOT Regulations (continued)

Collision Register and Reports

- Vehicle inspection requirements
 - Annual inspection
 - Inspection requirements (pre- and post-trip)
 - Preventive maintenance cycles and system of record
- Operations procedures
 - Dispatch
 - Hazardous materials applicable
 - Hours of service

		VEHICLE PREVENTIVE MAINTENANCE PROGRAM															
SERVICE		4,000 KM	8,000 KM	12,000 KM	16,000 KM	20,000 KM	24,000 KM	28,000 KM	32,000 KM	36,000 KM	40,000 KM	44,000 KM	48,000 KM	52,000 KM	56,000 KM	60,000 KM	64,000 KM
LUBRICATION, OIL & FILTER	(Every 5,000 KM or 3 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AIR FILTER - INSPECT/REPLACE	(Every 5,000 KM or 3 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
DRIVE AXLE BOOTS & SEALS	(Inspect every 5,000 KM or 3 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
P.C.V. VALVE	(Inspect every 10,000 KM or 6 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
BRAKE SERVICE	(Every 10,000 KM or 6 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TIRE ROTATION & INSPECTION	(Every 10,000 KM or 6 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TIRE BALANCE	(Every 25,000 KM or 12 months)					✓					✓				✓		✓
CLEAN & ADJUST REAR BRAKES	(As required, every 10,000 KM or 6 months)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
BRAKE SYSTEM FLUID FLUSH	(Every 50,000 KM or 2 years)									✓							✓
WIPER BLADES	(Replace every 12 months)			✓						✓				✓			✓
WHEEL ALIGNMENT/INSPECTION	(Every 25,000 KM or 12 months)					✓					✓			✓			✓
FUEL FILTER REPLACEMENT	(Every 40,000 KM or 20 months)									✓					✓		
TRANSMISSION SERVICE	(Every 50,000 KM or 2 years)										✓						✓
FUEL INJECTION SERVICE	(Every 50,000 KM or 2 years)										✓						✓
MAINTENANCE TUNE-UP	(As required)																✓
POWER STEERING FLUID FLUSH	(Every 50,000 KM or 2 years)										✓						✓
AIR INTAKE SERVICE	(Every 50,000 KM or 2 years)										✓						✓
GLYCOL COOLANT SYSTEM FLUSH	(Every 36,000 KM or 2 years)						✓							✓			
EXTENDED LIFE COOLANT FLUSH	(Every 100,000 KM or 4 years)																✓
REPLACE BELTS & HOSES	(Every 48,000 KM or 3 years)											✓					✓
TIMING BELT	(Every 100,000 KM or 4 years)																✓
DRIVE CLEAN	(Emission testing every 2 years)											✓					✓
SHOCKS & STRUTS	(80,000 KM as required or 40 months)														✓		

Written Safety Program — Essential Elements

J. General Safety and OSHA Regulations

- Recordkeeping requirements
- Pallet jacks, hand trucks, forklifts and safe lifting
- Slip and fall prevention and footwear policy
- Lockout/tagout for maintenance operations
- Personal protective equipment
- Equipment, dock and yard safety

Written Safety Program — Essential Elements

K. FAA Regulations

- As applicable due to airfield exposure
- Drivers must have SITA certification as required

L. EPA Regulations

- As applicable, based on spill/disposal hazards
- Fuel, chemical and storm-water pollution
- Collision-related spills
 - Pre-position spill response resources

Resources

Take advantage of resources:

- Your commercial insurance carrier and agent
 - **Written safety plan templates**
 - Online training modules
 - Behind the wheel defensive driving
 - Business leadership seminars, tools and forms
- Join/attend your local motor truck association
- Collaborate and meet with your peers



Questions and Comments?



Loss Prevention & Safety Services

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