

Keeping your drivers between the lines



In-House Managing and Monitoring of Religious Drivers Toolkit





Table of Contents

- ◆ 3 Introduction and Highlight of Areas of Development or Improvement
- ◆ 4 Responsibility and Accountability
- ◆ 5 Sample List of Responsibilities
- ◆ 6 Fleet Manager Responsibilities
- ◆ 7 Local Fleet Coordinator Responsibilities
- ◆ 8 Driver Acknowledgement of Form
- ◆ 9 Driver Profiles
- ◆ 10 Guidelines for Monitoring Drivers by Age
- ◆ 11 Motor Vehicle Record Checks
- ◆ 12 Identifying Red Flags with Cognitive Exercises
- ◆ 14 Driver Observations
- ◆ 15 Community Behind the Wheel Driver Observations Form
- ◆ 17 Community Behind the Wheel Driving Observation Descriptions

We offer risk management solutions in comprehensive property and casualty coverages with customized limits that meet the needs of Catholic organizations. We understand the Church because we are part of the Church.

Introduction and Highlight of Areas of Development or Improvement



This toolkit has resources and suggested activities to assist the community with either developing/upgrading their existing programs as it relates to religious driver management in the following areas:

- ▶ *Responsibility and Accountability*
- ▶ *Driver Profiles*
- ▶ *Guidelines for Monitoring Drivers by Age*
- ▶ *Motor Vehicle Record Checks*
- ▶ *Identifying Red Flags with Cognitive Exercises*
- ▶ *Driver Observations*

Risk Solutions at CBS has always been focused on helping our members manage risk, especially in the area of fleet and driver safety. When risk control staff are unable to visit a member, for whatever reason, it is important for members to have policies and programs to help them manage their drivers. The goal has always

been to have safe drivers and to have policies that help identify at-risk drivers, so action can be taken to manage the risk. Now more than ever, in order to do this, more engagement is needed from fleet personal and leadership. Many religious communities have relied on risk control to come out and conduct behind the wheel driver evaluations as needed, depending on the community's driver policy. Other service providers may be able to assist with testing of at-risk drivers and risk control encourages utilizing these providers when possible, if available and if it can be done safely. Sometimes it becomes a reality that more intervention is needed internally to manage drivers. The objective of this toolkit is to provide communities with information, suggested guidelines, and specific resources to assist with the monitoring and management of community drivers.



Responsibility and Accountability

When developing/updating a community's fleet program and policies on driver management and monitoring, there are a number of specific areas to be assessed and evaluated. Community drivers need to know everyone's responsibilities, both for leadership and their own. Having these policies will provide everyone with the community's expectations for one to have the privilege of driving the community vehicle.

Formally assigning responsibility and accountability sends the message that these processes are important. Responsibility should be assigned to those who manage the policy as well as those who follow the policy. Formal policies need to be reviewed to ensure responsibilities are assigned to the following individuals:

- ▶ *Driver*
- ▶ *Fleet Manager*
- ▶ *Local Fleet Coordinator*

Depending on the size of the community, there could be others who play a role in managing drivers. Some of the responsibilities of the individuals above could also be included in other job descriptions in various areas

of the organization. One example would be a healthcare coordinator who assists with the care of religious. Their position may be expanded to ask questions and assist the Fleet Manager/Leadership Team with determining if the health of a driver could put that driver at risk when driving. Some examples may include use of medications, sickness or cognitive changes. These individuals are also in a good position to keep this type of information confidential to those who need to know.

The other part of responsibility is accountability. Without holding individuals accountable for what is expected, a message is sent that these responsibilities are not important. Once a year, each individual should have their assigned responsibilities reviewed as to their performance.

To assist the community, a sample list of responsibilities for the three individuals mentioned above has been included here to help you meet your needs when developing/updating your policy.

Sample List of Responsibilities



Driver Responsibilities

The driver is responsible and accountable for meeting the minimum requirements of this policy. The driver is responsible to:

- ▶ *Have a valid driver's license in the state where they reside and carry it with them at all times*
- ▶ *Have their eyes checked every 12 months*
- ▶ *Comply with local and federal traffic laws*
- ▶ *Use a seat belt properly and make certain everyone in the vehicle uses their seat belt properly*
- ▶ *Drive and maintain the vehicle according to the owner's manual*
- ▶ *Maintain current insurance information in the vehicle*
- ▶ *Drive appropriately for weather and all road conditions*
- ▶ *Drive only if in good physical and emotional health*
- ▶ *Report any accident immediately to the local fleet coordinator and insurance provider*
- ▶ *Obtain a police report if involved in an accident*
- ▶ *Attend a driver awareness training session every two years*
- ▶ *Follow policy guidelines for behind the wheel driver evaluations*
- ▶ *Communicate openly and honestly with leadership/wellness coordinator concerning health issues which may affect driving ability*
- ▶ *Restrict the use of community vehicles to authorized drivers only*
- ▶ *Restrict the use of cell phones while driving and no texting while driving*
- ▶ *Sign Fleet Policy acknowledgement form*

Suggestions to Mitigate Driving Risks

- ▶ *Recognize driving limitations*
- ▶ *Limit night driving when possible*
- ▶ *Travel local roads—avoid freeways and interstates when possible*

- ▶ *Avoid driving during “rush hours”*
- ▶ *Use familiar routes*
- ▶ *Drive within posted speed limits and avoid excessively slow speeds*
- ▶ *Drive with your lights on at all times*
- ▶ *If possible, park so backing the vehicle is not required*
- ▶ *Avoid distractions such as use of a cell phone, looking at passengers, excessive conversation and diverting vision/attention from the road, etc.*

Guidelines/Signs for a Driver Possibly to Discontinue Driving

- ▶ *Drifting out of the lane*
- ▶ *Having difficulty making turns*
- ▶ *Confusing the gas and brake pedals*
- ▶ *Missing stop signs or stop lights*
- ▶ *Getting lost in familiar places*
- ▶ *Decreased physical strength*
- ▶ *Inability to turn your head to check blind spots and mirrors*
- ▶ *Impaired vision*
- ▶ *Slowed reaction time due to medications/sickness/disease*
- ▶ *Inability to concentrate or having wandering thoughts*
- ▶ *Having other drivers honk at you frequently*
- ▶ *Being spoken to about your driving by police, family, community members or friends*
- ▶ *Friends no longer feel comfortable being a passenger in your car*
- ▶ *Near misses and close calls*



Fleet Manager Responsibilities

The fleet manager is responsible and accountable for overseeing the entire community's policy administration, driver safety and fleet operations for religious drivers. The fleet manager is responsible for:

- ▶ *Maintaining, reviewing and updating the fleet policy*
- ▶ *Communicating any new or changed fleet policies to community drivers*
- ▶ *Monitoring and enforcing compliance to the policy with all local communities and their drivers*
- ▶ *Assisting local fleet coordinators with their compliance to the policy. These areas could include:*
 - *Coordinating driver awareness training*
 - *Coordinating behind the wheel evaluations*
 - *Maintaining a driver profile record*
- ▶ *Maintaining a driver profile to include records such as awareness training, behind the wheel evaluations, accidents, motor vehicle records (MVRs), discussions, etc.*
- ▶ *Playing an active role in reporting, monitoring and analyzing accidents. Specifically for frequency, severity, at-fault and accident repeaters, along with completing an accident investigation form to determine/implement corrective action when necessary.*
- ▶ *Ensuring fleet vehicles have a current insurance card, registration card and license sticker*
- ▶ *Ensuring fleet vehicles are being maintained in a safe driving condition*
- ▶ *Managing an appropriate vehicle replacement procedure to help select vehicles for those who will be driving that vehicle*
- ▶ *Ensuring drivers are oriented to new vehicles before they are permitted to drive the vehicle*
- ▶ *Managing an ongoing safe driver awareness program that periodically provides drivers with safe driving information throughout the year on topics such as winter driving, distracted driving, dealing with aggressive drivers, red flags for unsafe driving, etc.*
- ▶ *Working with coverage provider to maximize any available fleet credits for the community*
- ▶ *Maintaining and updating fleet policy at least every two years*
- ▶ *Monitoring all vehicles for accidents, damage and repair needs*

Local Fleet Coordinator Responsibilities



The local fleet coordinator is responsible and accountable for overseeing the local community's drivers and assist with their compliance to the community's policy. The local fleet coordinator is responsible to:

- ▶ *Communicate any new or changed fleet policies to local community drivers*
- ▶ *Monitor and enforce compliance to the fleet policy*
- ▶ *Assist with coordinating local driver awareness training and behind the wheel evaluations according to the community policy as well as for drivers, where their driving is a safety concern.*
- ▶ *Assist with maintaining a driver profile for local drivers to include records such as awareness training, behind the wheel evaluations, accidents, motor vehicle records (MVRs), discussions, etc.*
- ▶ *Play an active role in reporting, monitoring, and analyzing accidents. Specifically for frequency, severity, at-fault and accident repeaters, along with completing an accident investigation form to determine/implement corrective action when necessary.*
- ▶ *Ensure local fleet vehicles have a current insurance card, registration card and license sticker*
- ▶ *Ensure local fleet vehicles are being maintained in a safe driving condition*
- ▶ *Ensure drivers are oriented to new vehicles before they are permitted to drive the vehicle*
- ▶ *Annually discuss with local drivers any possible health/cognitive changes that might have occurred, medications currently being taking which could affect safe driving, status of last eye exam, recent accidents and citations*
- ▶ *Assist with the coordination of transportation needs for members who can no longer drive*
- ▶ *Conduct in-house cognitive exercises if there is an immediate concern with local drivers according to community policy*
- ▶ *Ensure drivers 65 years and older have annual eye exams*

NOTE: In some situations, these responsibilities will fall to more than one person. The key is to make the individual(s) assigned to these important fleet duties understand that they are responsible and accountable for completing them properly.



Driver Acknowledgement of Form

1. The (community name) has provided me with a copy of the policies defining use of the organization's vehicles. I have received, reviewed and understand these policies and agree to comply with them.
2. I have received a copy of an Accident Reporting Kit and have been trained on its use in the event of an accident. I agree to comply with its instructions and understand that it is my responsibility to inform my superior as soon as possible following any accident or incident. I further understand that it is my responsibility to notify proper law enforcement agencies as soon as possible and to prepare a written report describing the accident events.
3. I agree not to operate any organizational vehicle while under the influence of drugs or alcohol. I fully understand that, should I be found operating a community vehicle while under the influence of drugs or alcohol, it shall constitute grounds for immediate revocation of driving privileges.
4. I agree to abide by all federal, state and local laws and ordinances regarding the operation and use of any assigned vehicle. In addition, I understand that it is my responsibility, as a holder of a driver's license, to remain informed of and to comply fully with current and future laws and ordinances governing the operation and storage of motor vehicles.
5. I understand that I must report to the community any suspension, revocation or cancellation of a driver's license immediately upon receipt of a notice of the suspension, revocation or cancellation.
6. I agree to allow the community to request copies of my Motor Vehicle Report as often as the community sees fit.
7. I understand that my use of any community owned vehicle may be revoked or restricted in the accordance to the provisions outlined in organizational fleet policies, which I have read and reviewed.

Certification

I HAVE READ THIS ENTIRE AGREEMENT AND I FULLY UNDERSTAND THE LIMITATIONS WHICH IT IMPOSES UPON ME.

(Community Driver Signature) Date

(Local Community Superior Signature) Date

Driver Profiles



The fleet manager and/or the local fleet coordinator should be the individuals who are responsible for maintaining a current driver profile for each driver. Using a master spreadsheet with each driver listed can help with monitoring the community drivers. The spreadsheet should be updated at least monthly and data should be monitored to ensure expiration dates for driver's licenses, eye examination dates, last completion of driver training, etc., have been completed. This information is to be considered confidential. Also a reminder communication should be sent to drivers at least a month before expiration dates are to occur.

Contents to be Included in a Driver Profile

- ▶ *Religious Name*
- ▶ *Birth Name*
- ▶ *Email address*
- ▶ *Birth Date to Determine Age*
- ▶ *Driver's License Number*
 - State of license
 - Expiration date
 - Listed restrictions on license
- ▶ *Self-Declared Personal Driving Restrictions or Limitations (i.e., No Highway Driving)*
- ▶ *Community-Declared Personal Driving Restrictions or Limitations (i.e., No Highway Driving)*
- ▶ *Health Considerations*
 - Are hearing aids used?
 - Date of last eye exam
 - Any vision concerns to be monitored
 - Diabetes, High blood pressure, etc.

- ▶ *Motor Vehicle Records (monitor tickets)*
- ▶ *Accidents*
 - Number of accidents
 - Number of "At-Fault" accidents
- ▶ *Monitoring by Age*
 - Date leadership sat down with driver
 - Next date leadership should sit down with driver
- ▶ *Observation ride (internal)*
 - Date of last ride
 - Date of next ride
 - Results of the observation ride
- ▶ *Behind the Wheel Evaluations (external)*
 - Date of last ride
 - Date of next ride
 - Results of the evaluation
 - Restrictions suggest
 - Discontinue driving
 - Other suggestions
- ▶ *Results of Cognitive Red Flag Exercises*
 - Trail Making-B
 - SLUMS
 - Short Blessed Test
 - Clock Exercise
- ▶ *Driver Awareness Training*
 - Date attended
 - Next date of training

If you would like a sample Excel spreadsheet to help you manage and monitor your drivers' profiles, email Jeff Harrison, Director of Risk Control Services at jeff.harrison@cbservices.org



Guidelines for Monitoring Drivers by Age

Each religious community has a responsibility to maintain a safe fleet of vehicles and have safe drivers who drive those vehicles. There is a duty not only to the members in the community but also to all those the community's ministries serve that may involve transportation. This section will provide a variety of activities a fleet manager and leadership can utilize to monitor the pool of religious drivers according to their age. This section can be used as a guide to develop or improve upon the current activities and policy the community is currently utilizing.

Driver is less than 65 Years of Age:

- ▶ *Leadership documented discussions/review every five years*
 - Community needs to develop a schedule
 - After each accident
 - After a serious health concern that could affect driving
- ▶ *Driver Awareness training every two years*
- ▶ *Conduct an MVR every year*
- ▶ *Begin developing a driving profile for each driver*
- ▶ *Request annual or most recent eye exam*

Driver is between 65 and 74 Years of Age:

- ▶ *Leadership documented discussions/review every 1-2 years*
 - After each accident
 - After a serious health concern that could affect driving
 - Begin utilizing the Driver Self Reflection Checklist to aid in discussions
- ▶ *Driver Awareness training every two years*
- ▶ *Conduct an MVR every year*
- ▶ *Request annual eye exam*
- ▶ *Update individual's driving profile*

Driver is between 75 and 79 Years of Age:

- ▶ *Leadership documented discussions/review every year*
 - After each accident
 - After a serious health concern that could affect driving
 - Utilize the Driver Self Reflection Checklist to aid in discussions
- ▶ *Leadership should take an observation ride with drivers at least at ages 75, 77 and 79. These observations rides could also be done annually.*
- ▶ *Determine if cognitive/memory exercises should be used to identify red flags (possibly after an accident or membership reporting concerns with a driver, etc.)*
- ▶ *Driver Awareness training every two years*
- ▶ *Conduct an MVR every year*
- ▶ *Request annual eye exam*
- ▶ *Update individual's driving profile*

Driver is 80 Years of Age and Older:

- ▶ *Leadership documented discussions every year*
 - After each accident
 - After a serious health concern that could affect driving
 - Utilizing the Driver Self Reflection Checklist to aid in discussions
- ▶ *Schedule an outside behind the wheel driver evaluation at age 80, 82, 84, and every year thereafter*
- ▶ *Leadership takes an observation ride with each driver annually*
- ▶ *Determine if cognitive/memory exercises should be used to determine red flags (possibly after an accident or membership reporting concerns with a driver, etc.)*
- ▶ *Driver Awareness training every two years*
- ▶ *Conduct an MVR every year*
- ▶ *Request annual eye exam*
- ▶ *Update individual's driving profile*

Motor Vehicle Record Checks



Conducting motor vehicle record checks (MVRs) is one way a community's leadership can better understand a broader picture of risk as it relates to individual drivers. This process can be very useful to monitor drivers and provide leadership with good information they may not otherwise have known. Running MVR's on each driver can identify if individuals have received a number of tickets or citations. However, an MVR might not identify if the individual has been in an accident or if they have received a local ticket due to community police cameras monitoring intersections.

Sample Motor Vehicle Report (MVR) Procedure:

The MVR check will be used to determine driver eligibility according to this policy and in compliance with the federal Fair Credit Reporting Act (FCRA), as well as all applicable state and local laws. All drivers must meet the eligibility standards established by the community to be entitled to operate community vehicles.

A summary of rights under the FCRA will be provided to all persons who submit to a MVR check.

All persons who submit to a MVR check will be required to complete and sign an Acknowledgment and Authorization of rights under the FCRA. This may be collected electronically.

The refusal to consent to the MVR check or to provide accurate information for use during such MVR check may result in the loss of driving privileges of community vehicles.

Once completed, the community will provide the required MVR check information to a reputable outside entity that will complete the MVR check on the community's behalf.

Evaluating the Motor Vehicle Report

Motor Vehicle Reports will be reviewed by the Fleet Manager and/or Leadership, as follows:

Type "A" violation:

- One in the last five years will make a driver ineligible to drive.

Type "B" violations:

- Three or more violations
- Two or more at-fault accidents, or
- Negligent collisions in a three-year period will make a driver ineligible to drive.

Anyone amassing two moving Type "B" violations and one at-fault accident or negligent collision in a three-year period will be monitored and may require more frequent MVR reviews and/or training.

Type "A" Violations (Examples):

- ▶ *Driving under the influence of drugs or while intoxicated*
- ▶ *Driving with an open container (alcohol)*
- ▶ *Refusing to take a substance test*
- ▶ *Reckless driving*
- ▶ *Hit and run*
- ▶ *Fleeing or evading police*
- ▶ *Racing/speed contest*
- ▶ *Driving with license suspended/revoked*
- ▶ *Vehicular assault*

Type "B" Violations (examples):

- ▶ *Speeding*
- ▶ *Improper lane change*
- ▶ *Failure to yield*
- ▶ *Failure to obey a traffic signal or sign*
- ▶ *Driving too fast for conditions*

Persons submitting to a MVR check will be informed of the results of the MVR check in conformity with the requirements of the FCRA.

The information obtained through MVR checks will be kept confidential to the extent required by applicable law.

Records of the results of MVR checks will be disposed of in a manner that complies with applicable law.



Identifying Red Flags with Cognitive Exercises

The ability to drive safely requires more than just knowing the rules of the road or how to operate a vehicle. Driving safely also requires good vision, motor/sensory functions and cognition. Some of these can be generically assessed in-house by the community, some cannot. More importantly, the community must understand, “No single assessment or exercise can accurately predict the ability to drive safely,” as highlighted in the “Clinician’s Guide to Assessing and Counseling Older Drivers.”

There are a wide variety of reasons why one individual might perform poorly on an exercise one day and perform outstanding the next. Some of these examples could include sickness, such as a cold/flu, headache, nervousness, not having the ability to concentrate, dyslexia, medication, stress, fear of losing their license, etc. However, the community can conduct exercises to identify possible red flags. The exercises completed in-house should never be used for a diagnosis. Since utilization of any cognitive exercise would have to be further explored by a professional and by additional use of assessments, any exercises used should only be interpreted as a possible red flag to refer a driver to a professional to validate/confirm if any red flags exist and determine if there is a concern with the individual driving safely.

There are a few cognitive and motor/sensory exercises that can be performed in-house with community drivers. Before any of these exercises should be used, research and understanding how to conduct the exercises should be learned and practiced. Two good resources that can help walk you through the process of conducting the exercise can be acquired online and are free. These resources are:

“Clinician’s Guide to Assessing and Counseling Older Drivers 4th Edition.” This guide is a product of a cooperative agreement between the American Geriatrics Society (AGS) and the National Highway Traffic Safety Administration (NHTSA).

https://www.nhtsa.gov/sites/nhtsa.dot.gov/files/812228_cliniciansguidetoolderdrivers.pdf

<https://geriatricscareonline.org/ProductAbstract/clinicians-guide-to-assessing-and-counseling-older-drivers-4th-edition/B047>

“Physicians Guide to Assessing and Counseling Older Drivers 2nd Edition.” This guide is a product of a cooperative agreement between the American Medical Association (AMA) and the National Highway Traffic Safety Administration (NHTSA).

<https://one.nhtsa.gov/people/injury/olddrive/OlderDriversBook/pages/Contents.html>

The following are excerpts taken from the “Clinician’s Guide to Assessing and Counseling Older Drivers” that explain each of the exercises you might consider using to assess your older drivers. Many of these exercises and instructions on how to use the exercises can also be found in the “Physicians Guide to Assessing and Counseling Older Drivers.”

Trails A & B:

These tests of general cognitive function also specifically assess working memory, visual processing, visuospatial skills, selective and divided attention and psychomotor coordination. Numerous studies have demonstrated an association between poor performance on these exercises and poor driving performance.

Clock-Drawing Test:

This test may assess long-term memory, short-term memory, visual perception, visuospatial skills, selective attention, abstract thinking and executive skills. Preliminary research indicates an association between specific scoring elements of the clock-drawing test and poor driving performance.

Maze Test:

There are several versions of maze testing, including online versions. Depending on the type of test, it assesses visual perception, visuospatial skills, abstract thinking and executive skills. The Snellgrove maze is a one-page cognitive screen for driving competence that was validated with older adults with mild cognitive impairments or early dementia.

Identifying Red Flags with Cognitive Exercises



Rapid Pace Walk and Get Up and Go:

These tests are measures of lower limb strength, endurance, range of motion and balance. The Rapid Pace Walk has been linked with driving outcomes, whereas Get Up and Go has been more closely linked with falls and future disability and long-term care placement. Because falls have been associated with poor driving outcomes, either of these tests are appropriate measures for assessing overall motor abilities.

Two additional exercises the community can explore are:

SLUMS: Saint Louis University Mental Status

Exercise: The purpose of this exercise is to look for the presence of cognitive deficits and to identify changes in cognition over time. This document with instructions and training videos can be found at this link:

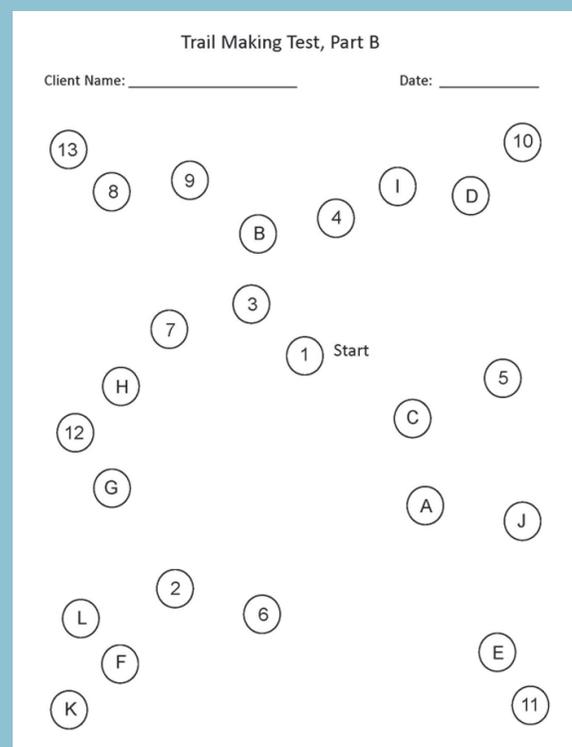
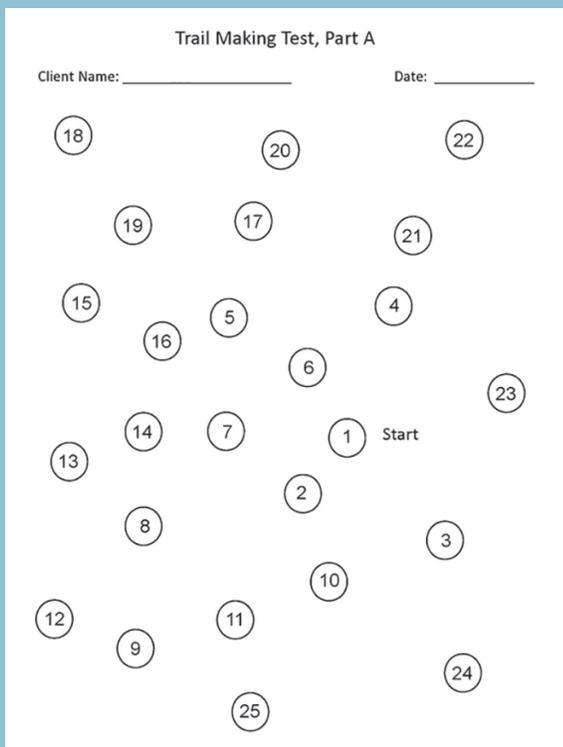
<https://www.slu.edu/medicine/internal-medicine/geriatric-medicine/aging-successfully/assessment-tools/mental-status-exam.php>

SBT: Short Blessed Test: This exercise addresses cognitive concerns in the areas of orientation, memory and concentration. The purpose of this test is to serve as a screening tool to determine cognitive changes. This exercise with instructions can be found at this link:

<https://knightadrc.wustl.edu/adrc2/Images/SBT.pdf>

Before utilizing any of these exercises listed above or others the community has found to be reliable, responsible persons should be identified, such as leadership or possibly a nurse who works in the community's health care department. The individual should educate themselves on how to properly conduct the exercise with the driver. Any information obtained during the course of these exercises should be kept confidential and supplied to those who would need to know how best to monitor a driver's safety.

Below are two examples of cognitive exercises taken from the "Clinician's Guide to Assessing and Counseling Older Drivers 4th Edition." These exercises, Trail Making Test Part A & B can be used with the instructions found in the guide.





Driver Observations

Driver observation is one of the best ways for leadership to quickly identify if there may be concerns with a driver's ability to drive safely. Knowing a driver is older and possibly uses a cane or walks slowly does not mean they cannot drive a car safely. There can be other factors such as recent accidents, moving violations, health issues, possible medications the driver might be taking, and reports that the individual keeps forgetting things. However, riding with a driver allows you to see for yourself if the individual appears to be safe when driving. This can help provide better support to leadership during a discussion with the driver since they have seen firsthand there could be some concerns that need to be managed or clarified as to why a maneuver was or was not done properly. It is recommended observation rides should begin with all drivers by the age of 75.

Driver observations can be done formally, such as with the attached "Community Behind the Wheel Driver Observation" form, or informally with the observer knowing what area of driving to look for while observing an individual's driving. These types of observations can take some practice, but once an individual becomes familiar with the areas of observation, a form might not be needed. The use of a form can depend on the organization's policies as to what is required, either formally or informally, so the form can be included in a driver's profile for purpose of discussion later, once the driver observation has been concluded. One of the benefits to using the form is that it can help organize one's thoughts before sitting down and reviewing the overall drive with someone.

Driver observations can also follow a planned route or the route can be meaningful in nature, for instance driving to a ministry, church, lunch or shopping. The route does not have to go through every line item on the observation form. This form was created to include many different driving examples so the observer can document what they have seen. These areas include:

- ▶ *Starting the Vehicle*
- ▶ *Backing*
- ▶ *Lane Changes*
- ▶ *Turns*
- ▶ *Intersections*
- ▶ *Stopping*
- ▶ *Open Road Driving*
- ▶ *Freeway and Merges*
- ▶ *Parking*
- ▶ *Parking Lots*

The following documents can be used by leadership or the designated observer to document an observation ride. There is also a guide to assist the observer with a description of what to look for in each line item listed on the observation form.

Community Behind the Wheel Driver Observation Form



Driver Name: _____ Observer Name: _____ Date: _____

Weather Conditions: _____ Condition of Vehicle: (Note dents/scratches) _____

Instructions: Be familiar with the test route and this form. Give instructions well in advance. The marks after each item indicate Yes, No, Needs Improvement or Not Applicable. Record remarks as the route is traveled.

	Y	N	NI	NA		Y	N	NI	NA
Starting the Vehicle					Stopping				
Checks around the vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No unnecessary sudden stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checks traffic before driving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stops in correct position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driver/passenger uses seat belt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stops smoothly (no jerky stops)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjusts mirrors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Open Road Driving				
Windows are clean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not follow too closely	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inserts key/starts no problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not cross center line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not rev engine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not drive in wrong lane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shifts to proper gears	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Passes others legally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard free of items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintains good lane position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Backing					Does not speed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observes traffic before backing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not drive too slow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not jerk while backing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scans for traffic/hazards ahead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nice steady speed of vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Is attentive when driving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Steering is not erratic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not miss signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Looks behind while backing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Follows instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Looks over both shoulders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Following distance (4 secs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses backup camera	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Checks mirrors regularly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Backs out only enough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not drift in or out of lane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lane Changes					Freeway and Merges				
Checks blind spot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proper use of signals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checks mirrors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proper speed entering freeway	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Signals 3 seconds before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proper speed exiting freeway	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changes lanes smoothly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proper lane usage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turns off signals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Safety cushion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turns					Scans ahead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses signals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parking				
Hands in correct positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Backs more than three times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good speed at turns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bumps curb or other vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not turn from wrong lane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scans for traffic/pedestrians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not turn into wrong lane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Signals properly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not cross into other lanes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Puts shifter in proper position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not turn too sharply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does not jerk vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not turn too wide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parking Lots				
Uses two hands when turning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parks correctly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yields when required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identify Hazards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intersections					Proper Speed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scans for all traffic/pedestrians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identifies Pedestrians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains speed on a green light	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proper Lane Usage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yields right of way	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Uses proper signals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Slow start when light turns green	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Maintains lane control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Uses caution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Community Behind the Wheel Driving Observation Descriptions



Starting the Vehicle

Checks around the vehicle

Observation Description

When walking toward the vehicle, the driver is aware and looks for anything out of the ordinary, items that may have rolled under the tires or might be in the way when backing out from parking spot.

Checks traffic before driving

Before moving the vehicle, driver checks all around for any other moving/stationary objects.

Uses seat belt

Before placing the vehicle in gear, driver properly secures seatbelt (does not put the seat belt under arm or around to the back) and checks all passengers are also properly using the seat belts.

Adjusts mirrors

Before moving vehicle, the driver adjusts seat and mirrors to assure mirrors are set to maximize view. This is common for shared vehicles.

Windows are clean

All windows should be properly cleaned and clear of streaks/debris with a clear view all around. This includes inside as well as outside.

Inserts key/starts no problems

Driver is able to insert key properly into ignition and start vehicle with no assistance.

Does not rev engine

When starting the vehicle, driver does not push down on the accelerator causing engine to rev/gun up.

Shifts to proper gears

Places gear shift in the proper gear for action they are completing. P=Parking, R=Reverse, D=Drive. Driver does not accidentally drive in 1st or 2nd gear.

Dashboard and back window free of items

There is clear vision out the front and rear windows. This includes no excess items hanging from the mirror or items placed on the dash which can cause glare.

Backing

Observes traffic before backing

Before starting to back vehicle, driver observes surrounding area traffic and makes sure all traffic is clear before beginning backing.

Does not jerk while backing

No sudden stopping or starting of vehicle while backing.

Nice steady speed of vehicle

Proper speed for backing. No sudden acceleration or stopping.

Steering is not erratic

Able to maintain proper control of vehicle while backing. No jerking the steering wheel back and forth.

Looks behind while backing

Once mirrors are checked, turns head left and right to look behind while backing. Driver should not solely depend on mirrors or camera for backing.

Looks over both shoulders

Turns head to the left and right and looks over both shoulders before and while backing.

Uses backup camera

Driver utilizes backup camera as a tool for backing however it should not solely be used for backing. The camera is used to help identify objects, people and distance to the end of the parking spot when backing into a parking spot.

Backs out only enough

While backing, driver does not back an excessive amount of space. Driver backs only what space is needed to safely leave parking spot area going forward.

Lane Changes

Signals three seconds before

Turns signal on for at least three seconds before changing lanes.

Checks blind spot

Turns head to look over shoulder before changing lanes.

Checks mirrors

Scans mirrors left to right after signal is used and then checks traffic before changing lanes.

Changes lanes smoothly

Changes lanes without any jerking or quick movements into the other lane.



Community Behind the Wheel Driving Observation Descriptions

Turns

Uses signals

Consistently signals before all turns.

Hands in correct positions

Maintaining both hands on the steering wheel at all times, using the 10 and 2, 9 and 3 or 8 and 4 positions depending on steering wheel design.

Good speed at turns

Maintains proper speed when making turns. Driver does not speed or stop during a turning maneuver.

Does not turn from wrong lane

Driver turns left from the left turning lane or right from the right turn lane, not from a non-turning lane.

Does not turn into wrong lane

When turning left maintains the left lane and turns into the closest lane not drifting out to the lane right of the proper lane.

Does not cross into other lanes

When turning right, driver turns into the closest right lane and does not drift into the outside left lane to complete turn.

Does not turn too sharply

Does not run over curb or into another lane when turning.

Does not turn too wide

Driver maintains proper lane when making turns and does not use the next lane to make a wider turn.

Uses two hands when turning

Maintains both hands on the wheel when making turns, utilizing the shuffle or push/pull method.

Yields when required

Driver watches for hazards and yields when required.

Intersections

Scans for all traffic/pedestrians

While approaching an intersection the driver scans the area ahead looking for traffic, obstructions or pedestrians.

Maintains speed on a green light

When the driver approaches an intersection on a green light and they intend to go through the intersection, they do not slow down. The driver should maintain a consistent speed. However, covering the brake (hovering the foot over the brake pedal but not touching) is an acceptable cautionary action the driver can take.

Yields right of way

Driver slows down or stops if necessary and yields the right-of-way to traffic in the intersection or on the intersecting road.

Slow start when light turns green

Once the light turns green, driver waits and looks left, right, left checking for oncoming traffic and waits for a second for any vehicle next to them to go first.

Maintains lane control

Driver stays in their lane and does not crowd another lane.

Uses caution

Approaches any and all intersections with caution and proceeds through cautiously looking in all directions for any movement that could prove to be dangerous.

Stopping

No unnecessary sudden stops

Driver keeps alert and well distanced (four seconds) from other vehicles to give themselves appropriate time to make safe stops.

Stops in correct position

Stops safely behind the white line at the intersection. Proper stopping distance in traffic is for the driver to be able to see the tires of the vehicle stopped in front of them touch the pavement while seated behind the wheel.

Stops smoothly (no jerky stops)

Beginning to approach an obstacle, takes foot off the accelerator (begins to slow), driver gently presses down on the brake pedal until they feel pressure from the brakes. Gradually continue to place pressure on the pedal until coming to a complete stop.

Community Behind the Wheel Driving Observation Descriptions



Open Road Driving

Does not follow too closely

Maintains proper following distance, four-second distance (with no other hazards such as weather/construction) from their vehicle to the vehicle in front of them.

Does not cross center line

Maintains vehicle in proper lane. No weaving over lane lines crossing over into oncoming traffic or traffic traveling in the same direction.

Does not drive in wrong lane

Drives in the proper lane for the speed the driver is comfortable going. Driver does not drive slowly in the fast lane.

Passes others legally

Checks blind spot, uses turn signal before passing other vehicles maintaining the proper speed limit.

Maintains good lane position

Driver keeps vehicle properly centered in lane. No swerving from side to side in lane.

Does not speed

Driver keeps vehicle at the posted speed or the safe speed for the conditions, e.g., traffic, weather.

Does not drive too slow

Driver is able to maintain at least the minimum posted speed limit.

Scan for traffic/hazards ahead

Driver keeps their eyes moving and looking ahead to observe upcoming traffic or hazards.

Is attentive when driving

Driver keeps their eyes on the road and their mind on driving. Does not appear to get distracted by outside/inside objects.

Does not miss signs

Is attentive and observes all posted signs.

Follows instructions

Listens, observes (signs) and follows all instructions.

Following distance (four seconds)

Maintains a four second following distance from the vehicle being driven to the vehicle being followed.

Checks mirrors regularly

Scanning all mirrors from left to right. Glance in all three mirrors every five to 10 seconds. By doing so, you are keeping yourself aware of everything going on around you.

Freeway and Merges

Proper use of signals

Turn signals are used at least three seconds before merging on/off freeway or changing lanes.

Proper speed entering freeway

When merging onto the freeway, the entire entrance lane is utilized to get vehicle to at least minimum speed if not the speed of the traffic flow before moving into traffic. Does not slow down on ramp unless a yield sign is posted.

Proper speed exiting freeway

Continues speed until properly on the exit ramp. Does not slow speed while on freeway.

Proper lane usage

Staying in the lane of traffic that is flowing at the speed comfortable for the driver. Not driving slowly in the fast lane.

Safety cushion

This refers to the distance between your vehicle and the vehicle in front of you. On the freeway there should be four seconds between your vehicle and the vehicle in front of you. This also means the driver does not block themselves in with vehicles on all sides. They should try to give themselves an out.

Scans ahead

Driver continually is watching in front, behind and around for traffic, hazards and obstacles.



Community Behind the Wheel Driving Observations

Parking

Parking tries more than three times

Incorrectly backing out or pulling into a proper parking space and needing to pull back in or out and tries more than three times.

Bumps curb or other vehicles

Entering or exiting a proper parking space without hitting other vehicles or the curb.

Scans for traffic/pedestrians

Driver keeps eyes moving and turns head to look over their shoulder to scan for other traffic and pedestrians.

Signals properly

Uses turn signals when parking and not assuming people will know.

Puts shifter in proper position

Making sure when parking the shifter is in P or when backing the shifter is in R.

Does not jerk vehicle

While backing, parking or taking off, does so smoothly. No hard braking or quickly accelerating. Avoids going to the accelerator.

Parking Lots

Parks correctly

Parks within the designated parking lines and parking in the proper direction.

Identify hazards

Is able to identify people, cars, or other items that can be hazardous.
Examples: shopping carts, bumper stops, other vehicles, pedestrians.

Proper speed

Maintains the maximum speed of 15 mph, if not slower. This is in accordance to circumstances and situations in parking lot.

Identifies pedestrians

Scanning around and behind vehicle when driving through parking lot to identify pedestrians.

Proper lane usage

While entering or exiting the parking lot the driver follows proper direction arrows. No driving across parking spaces.

Uses proper signals

Uses signal when making turns in parking lot whether into parking space or turning into a lane.



Jeff Harrison, CSP, ARM

630.378.2543

jeff.harrison@cbservices.org • cbservices.org

For over 60 years, Christian Brothers Services has been a trusted partner for Catholic institutions, offering cost-effective health coverage, retirement planning, property protection, and expert consulting. Let us handle the details so you can focus on your mission. Visit cbservices.org to learn more.