The following assessment allows you to conduct a self-assessment for your organisation (Business Unit Level).

Use 3 levels of self-assessment:

* Good - Everything included in the detail is in place.
* Intermediate - Some things included in the detail are in place.
* Poor - Few or no things in the detail are in place.

Scoring:

* Good - 1
* Intermediate - 0.5
* Poor – 0

Ranking (overall score):

* Good - 75-100%
* Intermediate - 25-75%
* Poor - 0-25%

Note – the document refers to Grey Fleet vehicles. These are any vehicles that are not owned or leased/hired by the organisation, typically ones owned or supplied by the employee and used for making work-related road journeys.

If you have any queries on the use of this document, contact: mail@roadrisktoolkit.com

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| **Management** |
| **Topic** | **Detail** | **Score** |
| **Financial Management** |
| Total Cost of Risk | The Total Cost of Risk, including ALL uninsured losses / hidden costs, is known and understood throughout the organisation, and is also understood in relation to how the revenue required to fund the Total Cost of Risk relates to the main product or service. |  |
| Risk Management budget | The work-related road risk management program has a separate budget, sufficient for the agreed actions, ring-fenced and reviewed at least annually in line with the evolution of the strategy and program. |  |
| **Operational Conflicts** |
| Aligning operating practices with safe driving requirements | Operational policies, procedures and practices are fully aligned with safe driving requirements and the organisation's safe driving policies. Any changes to operations, including acquisitions, take account of safe driving requirements before being finalised. |  |
| **Driver Supervision** |
| Driver monitoring | All drivers, including Grey Fleet drivers, are routinely and transparently monitored through the use of telemetry data, accompanied drives, public reporting of observed bad driving, analysis of records (fuel, maintenance, mobile phone) as appropriate. |  |
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| **Policies & Procedures** |
| **Topic** | **Detail** | **Score** |
| **Driving at Work / Fleet Safety Policy** |
| Work-related road risk management policy | A comprehensive policy is in place, reviewed & updated annually. |  |
| Legislation | The policy is fully compliant with local legislation, in all areas of operation, and clearly set's out the expectations of the employee to comply. |  |
| **Distracted Driving Policy** |
| The use of mobile telephones | No use of mobile phones is allowed while driving, including hands-free, and auditing takes place to check compliance. Drivers must never use their smartphone, for anything other than navigation (if allowed in the policy) while driving. |  |
| Other distractions | The use of any potentially distracting equipment is not allowed while driving, with auditing to check compliance. |  |
| **Fatigue Management Policy** |
| Total working hours | There is a policy that limits the total length of working day, including driving and commuting, with an audit trail in place to demonstrate compliance. |  |
| **Drug & Alcohol Policy** |
| Drug & alcohol policy | There is a comprehensive policy that has zero tolerance to any alcohol or recreational drugs in any driver's system, regardless of local legislation. The use of medicines, both prescription and ‘over the counter’, is also covered by the policy in relation to those drugs that may increase the risk of the driver being involved in a crash (e.g. those that may cause drowsiness). |  |
| **Eyesight** |
| Eyesight testing | All employees making work-related road journeys, including Grey Fleet drivers, are provided with eyesight tests at least once every 2 years, with an audit trail. |  |
| **Speed Management** |
| Speeding | There is a formal policy around driving within the speed limits and at an appropriate speed for the prevailing road conditions (e.g. in poor weather conditions), with an audit trail in place covering all employees, including Grey Fleet drivers. |  |
| **Policy Management** |
| Reviews & updates | Policies are reviewed and updated annually to take account of changes in operational practices, road safety management, legislation changes and continuous improvement initiatives. |  |
| **Grey Fleet Management** |
| Scope | Either there are no employees who EVER make journeys in vehicles not owned or managed by the organisation or ALL employees who EVER make a work-related road journey are subject to the policy. |  |
| **Auditing** |
| Audit trails | An audit trail exists for ALL policies to demonstrate that they are being followed and are effective. |  |
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| **Assess** |
| **Topic** | **Detail** | **Score** |
| **Risk Assessments** |
| For all drivers | All employees who ever make a work-related road journey, including grey fleet drivers, are risk assessed. |  |
| **Driving Licence Checks** |
| All licences are checked | All drivers including, including employees driving Grey Fleet vehicles, have their driving licences checked to ensure that they are current and also that they are valid for the vehicle being driven. |  |
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| **Control** |
| **Topic** | **Detail** | **Score** |
| **Driver Interventions** |
| What interventions are in place? | Blend of in-vehicle, classroom and online, based on the identified need from the assessment data (risk assessments, collision debriefs, driver behaviour telemetry data and driving licence checks). |  |
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| **Measure** |
| **Topic** | **Detail** | **Score** |
| **Collision Management** |
| Direct costs | All insurance costs, and any below deductible (below the insurance excess) costs associated with driving incidents, are known and understood by all stakeholders. This helps make sure that everyone understands the full implications to the business of a collision. |  |
| **Key Performance Indicators** |
| Lagging indicators | Lagging indicators, including Collisions per Million Miles (CPMM), collision costs, cost of maintenance and the number of driving violations, are known for all drivers, including employees driving Grey Fleet vehicles, are recorded monthly and known & understood by all stakeholders. |  |
| **Collision Reporting** |
| Driver reporting | Comprehensive data, including photographs, are recoded by the driver for each incident and reported to insurers immediately and to the Line Manager within 24h. |  |
| Bump cards | All drivers, including employees driving Grey Fleet vehicles, have a comprehensive bump card or equivalent, covering all details that will be helpful in the subsequent root cause analysis as well as what insurers require, to allow all details of the incident to be recorded in a systematic way. There is evidence that these are completed in full after each incident. |  |
| **Management Reporting** |
| Visibility to senior management | All Key Performance Indicators associated with the work-related road risk management program are distributed to all senior managers at least monthly. |  |
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| **Driver** |
| **Topic** | **Detail** | **Score** |
| **Driver Handbook** |
| Driver handbooks supplied | Driver handbooks are provided to ALL employees who make work-related road journeys, including employees driving Grey Fleet vehicles, which include all key policy and procedure items along with safe driving advice. The handbook should help employees comply with your safe driving policies and procedures. |  |
| Review and update | Handbooks are reviewed annually and/or whenever significant changes are made to policies and procedures or driving safety advice and updated accordingly. |  |
| **Driver Responsibilities** |
| Fitness to drive | All drivers, including employees driving Grey Fleet vehicles, ensure that they are fit to drive before making ANY work-related road journey. This includes issues relating to health, eyesight, impairment and fatigue. |  |
| Complying with the Law | All drivers, including employees driving Grey Fleet vehicles, comply fully with all local legislation. There is an audit trail that demonstrates that the majority of drivers comply with this obligation (e.g. from speeding fines). |  |
| Reporting changes in circumstance | All drivers, including employees driving Grey Fleet vehicles, are fully obligated to notify their Line Manager of any changes in circumstances that could change the risks they face. This includes health issues, changes in location and changes to driving licences. |  |
| Vehicle safety | All drivers, including employees driving Grey Fleet vehicles, are fully aware of their obligation to ensure that the vehicle they are using for work-related road journeys, regardless of ownership, is fully legal and meets the organisation's minimum safety requirements. There is evidence that this obligation is usually complied with (e.g. from maintenance records such as vehicles being found with one or more defective tyres). |  |
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| **Journey** |
| **Topic** | **Detail** | **Score** |
| **Assessing the need to travel** |
| Unnecessary journeys are eliminated | Journeys are eliminated wherever possible, through changes to operational practices (e.g. using videoconferencing to replace the need for travel in some instances). |  |
| **Adverse Weather Conditions** |
| Driving in extreme weather | No journeys take place in extreme weather conditions, where authorities have advised against travel or where your dynamic risk assessment shows that there are unacceptable risks. |  |
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| **Vehicle** |
| **Topic** | **Detail** | **Score** |
| **Vehicle Selection** |
| Vehicles are fit for purpose | All vehicles, including Grey Fleet vehicles, are suitable for the required journeys (fit for purpose). This includes ergonomic issues around seating positions, what is being carried in the vehicle and loading/unloading.  |  |
| Minimum safety specification | All vehicles are fitted with seatbelts for all seats, 2 wing mirrors, 2 Airbags, and Electronic Stability Control as a minimum. If your minimum safety specification is more advanced, then this should be used as the criteria here. |  |
| **Vehicle Maintenance** |
| Routine maintenance | All drivers check their vehicles at least once per week, with evidence to support this. For vans & trucks, these checks are carried out daily. There is an audit trail to support this. |  |
| Servicing | All vehicles, including Grey Fleet vehicles, are serviced as per the manufacture's schedules and/or variable intervals, by OEM garages. There is an audit trail to support this. |  |



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