**Example - Annual driver observation form**

*Note – Blue text to be reviewed and edited or deleted.* (Document control information here)

The purpose of the driver observation is to assess a driver’s competency and safe driving behaviour, review rules for drivers, and communicate any project-specific or local hazards. It should be completed annually (or other risk-based frequency set by company), or as needed. The assessor must record the driver’s competency on this form and file the record.

**Instructions for Assessor**

*Competent driver assessors (company to identify/define these) will conduct the training and assessment. Assessors must only train on sections they are competent in (eg. some might not cover off-road driving, winter driving, etc.).* Assessors should plan a route in advance that includes the normal driving requirements of the project and the driver’s role (eg. highway, off-road, etc.). Include any project-specific or local hazards (eg. dangerous intersections, blind corners, roads shared with heavy equipment, etc.) Before beginning the driver observation, explain the process and review this form with the driver. Review the *Rules for Drivers* (below) first, while vehicle is parked. Review the relevant sections of any other driving-related documents (eg. Safe Work Procedures)*.* Do a Field-level risk assessment together before you start the drive. Begin driving, and give constructive feedback immediately (if safe to do so). Have a wrap-up discussion at the end.

**Rules for Drivers** (defined by company)

* Company owned or rented vehicles are for company business only, unless specifically authorised.
* **Journey management plan** - use the established project system for journey planning and log-in/log-out prior to starting your trip. Check weather and road conditions before driving, and make conservative decisions.
* **Fitness for work and fatigue management** - Plan to drive for no more than 8 hours in a day. Take regular rest breaks of 15 minutes ~ every two hours. Driving more than 8 hours in one day or shift must be approved in advance. If you feel fatigued or experience micro-sleep; pull over. You are only permitted to drive when your blood alcohol content is zero. You must NOT be under the influence of any illegal or legal substance that could affect your ability to safely operate a vehicle.
* Plan your driving tasks to avoid night driving as much as possible. Exceptions to this rule include short trips at night in a familiar environment (e.g. hotel to restaurant, warehouse to office), or emergency transport. Where night driving cannot be avoided you must have prior approval.
* **Vehicle pre-operational inspection** – Do the inspection before operating the vehicle. Do not operate the vehicle if important safety features are not working. Report any issues that you are unable to fix right away to the site vehicle manager, and lock the vehicle out if it is not safe to use.
* Ensure passengers wear their seat-belts and, if needed, instruct them not to distract you while you are driving. If warranted, ask passengers to remain alert and warn you of any hazards on the road (eg. animals).
* Never allow passengers to travel in the box or deck of a vehicle.
* Ensure that vehicle loads are **within approved weight limits (check vehicle limits) and are secure**. Items carried within the cabin of the vehicle must also be secured, eg. with seatbelts, in packs or bags, nets, tarps, etc. Note that to drive with a vehicle/trailer load weight > 4,500 kg, you may need an additional license or endorsement on your existing provincial driver’s license (rules differ by province).
* **Drive within posted and project-specific speed limits** at all times. Projects may set specific lower limits for shared haul roads, residential areas, access trails, etc. **Drive to conditions**. Lower your speed to suit weather, road surface conditions, heavy loads, etc.
* **Avoid distracted driving**. Give your full attention to the task of driving. Do not make or receive phone calls or texts, even with hands free devices. Use your rest breaks for eating and drinking. If needed, pull over, or have a co-pilot help with navigation, climate control settings, etc.
* **Positive communication** - Radio communications equipment (including vehicle mounted and hand-held) should be located within easy reach. Preference is for a passenger to control the radio whenever possible.
* Spotters may be required for backing up on project sites. If using a spotter, agree to hand-signals in advance. If you cannot see the spotter; stop the vehicle immediately.
* **Fundamentally stable parking** - Manual vehicles should be left in gear, and automatic vehicles in park (P). Emergency brakes should be applied, except in extreme cold to prevent freezing up. When parking at field sites (drill pads, access trails, etc.) wheels must be chocked or set in a parking ditch or berm. Reverse park (back-in), unless there is a good reason not to do so (eg. site configuration, plugging in to block heater, etc.) Always check underneath and around parked vehicles before driving off.
* Where applicable, avoid leaving keys in unattended vehicles, to ensure there is no unauthorised use and potential injury to others.
* Review the reporting requirements for vehicle incidents.

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| **Driving Observation –** Observe, discuss, and give feedback on the following safe driving behaviors | | | | |
| **Behaviors Observed** | | **Y/N** | **Comments** | |
| Thorough pre-op check. Assessor to demonstrate daily pre-op and monthly inspection. Ensure that brake check is done by moving vehicle forward slowly, then applying brake. | |  |  | |
| Adjust seat, mirrors, steering wheel, etc. to suit individual. Push out mirrors to minimize blind spots. Always drive with lights on (both day and night). | |  |  | |
| Smooth acceleration, braking, cornering. Stops at good distance from stop line, light, other vehicles. Come to a complete stop before moving again. | |  |  | |
| Eyes on direction of travel, scanning side to side, lead time (looking far ahead) | |  |  | |
| Appropriate speed and following distance, 2 second rule minimum (for ideal conditions) | |  |  | |
| Uses mirrors and checks blind spots appropriately. Indicates intention to turn or change lanes in advance. | |  |  | |
| Appropriate lane selection and position within lane (highway driving). | |  |  | |
| Full attention on task of driving - Discuss cell phones, GPS, eating/drinking, and other common distractions. | |  |  | |
| Discuss field level risk assessments, and make conservative decisions when conditions change (sunlight, glare, fog, snow, road surface conditions, etc). | |  |  | |
| **Additional project-specific training (cross out entire section or specific items that are not applicable)** | | | | |
| **Logging road, gravel road, mountain road driving**  Review 4WD High and Low settings, manually limiting gears, exhaust brakes – check manual. Driving on washboard, steep sections, switch backs, etc. Check radio use (if applicable). | |  | Competent? Y / N | |
| **Winter driving**  Review use of 4WD / traction control settings – check manual. Hands-on demo/competency check on putting on tire-chains. | |  | Competent? Y / N | |
| **Reversing/Spotter training for backing up vehicles**  Use of backup camera, side and rearview mirrors. Have driver reverse park.  Review hand-signals (always check these with driver).  Spotter to stand in a safe location. Ensure driver sees you in mirror. Roll down window for verbal coms.  For more complex tasks (eg. articulated vehicle, trailer); do a field level risk assessment. Use only experienced, competent spotters, and consider radios or position a 2nd spotter. | |  | Competent? Y / N | |
| Note: See other safe work procedures for other competency-based training, eg. *Vehicle Extraction*, *Trailer operation*, etc.  **Other project specifics or general comments.** | | | | |
| Driver’s name: | Driver’s signature: | | | Date: |
| Competency (Y/Y with restriction(s)\*/N) | Note restrictions (if any): | | | |
| Assessor’s name: | Assessor’s signature: | | | |