Implementing Humanitarian Fleet Management Standards

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This guide has been developed as part of the “Humanitarian Fleet Management Standards Project,” which has been funded by the UPS Foundation. The Humanitarian Fleet Management Standards have been developed in partnership with INSEAD and with the contribution of many humanitarian organisations. Fleet Forum wishes to express gratitude to all of them for their valuable support.
Purpose

The purpose of this guide is to assist aid and development organisations in implementing Fleet Forum’s Humanitarian Fleet Management Standards.

The Humanitarian Fleet Management Standards, a project funded by the UPS Foundation, were developed to support organisations in managing and operating their fleet against a set of quality standards in the area of cost efficiency, programme effectiveness, safety, and environmental impact. The standards were developed based on good practices from various fleet-operating organisations and adapted to the aid and development sector.

The Fleet Management Standards and the tools that are available can be used in different ways. If you want to assess your organisation’s performance, you can use the self-assessment. If you want to gain a clear picture of the gaps you are facing, you can use the gap analysis. If you want to make your organisation more effective, more efficient, safer, and/or cleaner, the most effective use is to implement the Fleet Management Standards in your organisation.

Fleet Forum wishes to express its sincere gratitude to all the organisations that have contributed to the development of the standards.

Introduction

Aid and development agencies face an ever-increasing demand for the delivery of relief and development programmes around the world. Operating in rapidly changing environments and under extremely variable circumstances, with restraints on resources as they try to serve the most needy, agencies are faced with the challenge of delivering more with less. Underpinning this scenario is an essential need to improve the transport capacity that will allow agencies to achieve their mandate to help the most vulnerable segments of society. As agencies seek to better manage and utilise their essential transport capacity, a major requirement is the need to gain insight into their fleet operations performance focusing on road safety, environmental impact, and cost efficiency.

Transportation is a cornerstone of aid and development programme delivery, and it is the second largest cost to the agencies. Aid and development fleets are used to monitor, coordinate, and execute last mile distribution of assistance. If we consider 4x4 vehicles alone, the aid and development sector currently operates over 80,000 vehicles with an estimated operational cost to the sector of $2 billion per annum (FF, 2010). Additionally, transportation has a direct impact on the environmental and safety aspects of aid and development programmes. The vehicles used by the organisations produce 500 thousand tonnes of CO2 emissions per annum (UNEP report, 2009) and are the highest cause of death and injury among aid and development staff.

The implications of this for programmes generally include: death and injuries amongst staff and local communities, disruption to programmes due to lack of available vehicles or accidents, risk to reputation in terms of environmental and safety issues, unnecessarily high costs in terms of aged or oversized fleets, lack of economies of scale in procurement, and rising fuel consumption. Fleet management performance across the aid and development sector is heterogeneous. Some perform well. Some have substantial room for improvement.

In answer to this challenge and to increase fleet management quality in the sector Fleet Forum has developed Fleet Management Standards for Aid and Development Organisations.
Who can Benefit from Implementing the Humanitarian Fleet Management Standards?

All aid and development organisations that manage and operate a vehicle fleet and wish to increase the effectiveness of their organisation, reduce the number of accidents, and/or reduce their environmental impact can benefit from implementation.

Why Should Organisations Implement the Humanitarian Fleet Management Standards?

Experience with improving fleet management in aid and development organisations showed that the following benefits could be achieved:

- Cost savings. Operating costs can be reduced by up to 15%.
- Increased programme delivery. By improving fleet operations, aid and development organisations can reach more beneficiaries with the same amount of funding. Increased safety. Road traffic crashes can be reduced by up to 40%.
- Reduced environmental impact. CO2 emissions, particular matter, and fuel consumption can be reduced up to 15%.

Level of Standards

The Fleet Management Standards have been divided into three levels: Basic, Advanced, and Professional Standards:

- Basic Standards describe the minimum quality standards that any organisation should have in place to be compliant with good practice.
- Advanced Standards describe a commitment to become safer, greener, cost efficient, and effective.
- Professional Standards describe standards that aim to a high quality of fleet management and continuous improvement.

Self-Assessment

Fleet Forum has developed a self-assessment that organisations can use to assess the level of fleet management in their organisation. The assessment allows organisations to measure fleet management from an organisational perspective as well as a practical implementation (in-country) perspective. An example can be seen on the following page.

<table>
<thead>
<tr>
<th>Self-Evaluation against VFM standards. Please fill out the appropriate cell for each of the two scoring dimensions with “x”</th>
<th>The statement agrees with the policy, procedure, or structure in my organisation</th>
<th>The statement is implemented practically by my office</th>
<th>Total Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>How well do YOU rate your organisation at the respective level of your position (HQ or country office) for the following topics?</td>
<td>weakly</td>
<td>reasonably</td>
<td>strongly</td>
</tr>
<tr>
<td>BASIC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>My organisation has a clear fleet management strategy in place that describes how vehicle fleets support the mandate/programme objectives of the organisation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>In my organisation an appointed senior manager is accountable and responsible for managing and executing the fleet strategy.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>In my organisation there is an appointed senior manager accountable and responsible for fleet and road safety.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The self-assessment tool can assist organisations in analyzing fleet management efficiency.
**Example 1**

In the headquarters of Organisation X, a 5-year strategy has been developed as to how the fleet should support the organisation’s goal (reaching the most beneficiaries in the most cost-efficient way). This statement is rated as “Strongly.” Although the strategy has been communicated to the country office, this objective has not been incorporated in the strategy or year plan of the country office. This statement is rated as “Weakly.”

<table>
<thead>
<tr>
<th>Self-Evaluation against VFM standards. Please fill out the appropriate cell for each of the two scoring dimensions with “x”</th>
<th>The statement agrees with the policy, procedure, or structure in my organisation</th>
<th>The statement is implemented practically by my office</th>
<th>Total Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>How well do YOU rate your organisation at the respective level of your position (HQ or country office) for the following topics?</td>
<td>Agree</td>
<td>Disagree</td>
<td>very strongly</td>
</tr>
<tr>
<td>1 My organisation has a clear fleet management strategy in place that describes how vehicle fleets support the mandate/programme objectives of the organisation.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 In my organisation an appointed senior manager is accountable and responsible for managing and executing the fleet strategy.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 In my organisation there is an appointed senior manager accountable and responsible for fleet and road safety.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The assessment will provide a high-level gap analysis and provide organisations with insight as to where to make improvements.

**Example 2**

The fleet manager of Organisation X in Kenya has filled in the self-assessment. Based on the gap analysis that is generated, he discovers that his organisation only scores 8 out of 32 points in the area of Reviewing: Collecting data and measuring performance. The fleet manager can look into the individual standards to make improvements.
Annual Benchmark

Fleet Forum provides an opportunity for organisations to assess their fleet management against other organisations. Yearly\(^1\) a benchmark survey will be executed in which the level of adherence towards the standards is measured. Participants in the benchmark survey will receive an organisation-specific analysis of their scores against the sector.

The benchmark survey can be found online here.

Starting with the Humanitarian Fleet Management Standards

This section provides suggestions as to how to start implementing the Humanitarian Fleet Management Standards.

**Step 1: Plan the Assessment**

In many organisations, various functionalities deal with the management and operation of the vehicle fleet—from the day-to-day operational activities that are often performed by fleet or logistics staff to the activities at management level that ensure the fleet is operated in the most efficient, effective, and safe way with the least impact on the environment. It is recommended that all staff members who have a responsibility for fleet management be included in the planning of the assessment. Functionalities that can be considered include fleet managers, human resources (recruitment, selection and deployment of drivers, career development of fleet staff), finance and procurement (information about procurement and financial policies and procedures), senior (country) management (to gain insight about fleet management at a strategic level), and programme staff (as end-users of the service).

The assessment can be shared upfront with the various staff members so that they can form an opinion about the level of fleet management in the organisation.

**Step 2: Conduct the Assessment**

It is recommended that a cross-functional meeting be organised so that all stakeholders in the organisation can conduct the assessment. The more input provided from different stakeholders, the more insight the organisation will get on the level of fleet management in the organisation. The Standards can be rated based on the discussions that derive from different perceptions, which will lead to the gap analysis.

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\(^1\) The deadline for participating in the benchmark is set to 1 February of each year. Organisations that participate in the benchmark survey will receive their results before 31 March. Fleet Forum will only share benchmark results with organisations that have filled the survey completely.
Assessing your organisation from two dimensions:

The assessment allows assessing your organisation from two dimensions, the organisational level and the practical implementation:

<table>
<thead>
<tr>
<th>Self-Evaluation against VFM standards. Please fill out the appropriate cell for each of the two scoring dimensions with &quot;x&quot;</th>
<th>The statement agrees with the policy, procedure, or structure in my organisation</th>
<th>The statement is implemented practically by my office</th>
<th>Total Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>How well do YOU rate your organisation at the respective level of your position (HQ or country office) for the following topics?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>always</td>
<td>reasonably</td>
<td>insufficiently</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Important: while conducting the assessment, it is important to have a critical look at the practical implementation column described in the standards. That “proves” your score.

Example 3

The headquarters of Organisation X has written a vehicle policy. In the policy the organisation states that all the passengers in the vehicle should wear a seatbelt and that the driver is not supposed to start the vehicle if passengers aren’t buckled up. When the global fleet manager arrives in one of the country offices, he notices that staff traveling in the back of the vehicle is not using seatbelts. The staff is not adhering to the organisations’ procedure, which would make the rating in the assessment “Weakly.”

Step 3: Analyse the Gaps

Based on the ratings, a high-level gap analysis will be created. The gap analysis will show in which areas the organisation can improve and whether the gaps are at “organisational level” or at “practical implementation” level. The following table describes the areas per standard level.

<table>
<thead>
<tr>
<th>Standard level</th>
<th>Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Standards</td>
<td>Strategic Fleet Management</td>
</tr>
<tr>
<td></td>
<td>Operational Policies and Procedures</td>
</tr>
<tr>
<td></td>
<td>Reviewing: Collecting Data and Measuring Performance</td>
</tr>
<tr>
<td>Advanced Standards</td>
<td>On-going Improvement of Performance</td>
</tr>
<tr>
<td></td>
<td>Controlling/Mitigating Business Risks</td>
</tr>
<tr>
<td></td>
<td>Analysing Data and Identifying Corrective Actions</td>
</tr>
<tr>
<td>Professional Standards</td>
<td>On-going Improvement of Performance</td>
</tr>
</tbody>
</table>

Tip: When your organisation starts with the Fleet Management Standards, it is recommended to focus on getting the basics right first. The Basic Standards form the foundation of professional fleet management. When the outcome of the Basic Standards Assessment is at a satisfactory level (scoring more than 240 points), the organisation can move to the Advanced Standards. See also Step 7: Assess Again.
Example 4

Organisation X has a global vehicle disposal policy stating that vehicles should be disposed after 5 years or 150,000 kilometres. When doing the assessment, the fleet manager in Kenya finds out that the average age of his fleet is 4.5 years, meaning that there are vehicles that are over the disposal age. The organisation has a gap in the Basic Standards – Operational Policies and Procedures at practical implementation level, and an action should be defined to close the gap.

Step 4: Determine Short-, Mid-, and Long-term Actions

No organisation can work on all the gaps at the same time; prioritization is needed. You can prioritize either based on impact or based on control over implementation. The following table outlines how you can prioritize:

<table>
<thead>
<tr>
<th>Action</th>
<th>Impact on Organisation’s Performance</th>
<th>Control over Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-term (implementation in 1 month)</td>
<td>High or Medium</td>
<td>High—the organisational unit has full control</td>
</tr>
<tr>
<td>Medium-term (implementation in 2 to 4 months)</td>
<td>Medium</td>
<td>Medium—implementation depends on other stakeholders</td>
</tr>
<tr>
<td>Long-term (implementation in 4 to 12 months)</td>
<td>Low</td>
<td>Low—implementation mostly depends on decisions made by others</td>
</tr>
</tbody>
</table>

Example 5

During the Basic Standards Assessment, the fleet manager of Organisation X finds out that the minutes and action points from drivers’ meetings are not captured. Even though the impact on the organisations’ performance is low, the fleet manager decides to create a short-term action because he has full control over the action and improving on this standard is a quick and easy win.

Example 6

Organisation X has no fleet management strategy and the fleet manager in Kenya has rated this standard as “Weakly.” To develop a fleet management strategy, the operations director at headquarters needs to make a decision. The fleet manager has identified the development of the strategy as a long-term action (as he has low control over it), but he also made a short-term action to address the absence of a strategic fleet approach to headquarters.

Prioritising the gaps

A good way to prioritise the gaps is to use a matrix. After conducting the self-assessment, list all the gaps that have been identified. After this, the first step is to rate the impact on the organisation’s performance. The second step is to rate the level of control that you have over the implementation.
Example 7

Organisation X has conducted the self-assessment and identified the following gaps:

- Staff does not follow the vehicle request policy; vehicles are frequently requested at the very last minute.
- The organisation does not have a strategy in place to reduce the emissions of the fleet
- In the country office there is no procedure to make sure that vehicles are safely loaded.

Through discussions, the fleet managers rank the gaps, based on “impact on performance” and “control over implementation.”

<table>
<thead>
<tr>
<th>Gap identified</th>
<th>Impact on performance</th>
<th>Control over implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff does not follow vehicle request policy</td>
<td>High—it leads to last-minute requests, increased operating costs, and challenges with planning of maintenance</td>
<td>High—we can reinforce the policy ourselves</td>
</tr>
<tr>
<td>We don’t have a strategy to reduce the emissions of the fleet</td>
<td>Medium—it doesn’t impact us now but can affect our reputation in the long-term</td>
<td>Low—strategies are defined by HQ</td>
</tr>
<tr>
<td>We don’t have a procedure for safe loading of the vehicle</td>
<td>Low—in our organisation it is rare that we carry a load in our vehicle</td>
<td>High—we can add a procedure to our local fleet manual</td>
</tr>
</tbody>
</table>

To visualise which gaps need to be addressed first, the fleet manager creates a gap matrix.

In this example it becomes clear that the gap in the vehicle request policy needs to be worked on first, because it is rated both high on impact as well as high on control.

A template to prioritise the gaps can be found here.
**Step 5: Implement the Actions**

Implement the actions according to your action plan. It is recommended that the status of the implementation be discussed on a regular basis, for example during monthly meetings. In the “Gap Assessment Template” you can find an action plan template.

<table>
<thead>
<tr>
<th>Gap</th>
<th>Target</th>
<th>Planned Action</th>
<th>Desired Results / Outputs</th>
<th>Target Date</th>
<th>Date Achieved</th>
<th>Responsible Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-adherence to Vehicle Request Policy</td>
<td>90% of Trips Requested per Policy</td>
<td>Communication in staff meetings</td>
<td>Increased Awareness about Policy</td>
<td>1st Aug 2014</td>
<td></td>
<td>Country Director</td>
</tr>
<tr>
<td>Long-term (implementation in 4 to 12 months)</td>
<td>Data collection of trips that are not requested</td>
<td>Getting insight in root causes of not adhering to policy</td>
<td>1st Aug 2014</td>
<td>Fleet Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Send a “tip of the week” to staff”</td>
<td></td>
<td>1st Sept 2014 Onwards</td>
<td>Fleet Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 6: Monitor the Results**

It is important to monitor whether the chosen actions lead to an improvement in fleet management quality. This can be done by analysing the Key Performance Indicators (KPIs) for Fleet Management, which will give you insight in the quantitative performance, and also by analysing the qualitative performance of your fleet.

**Tip:** For insight into the KPIs, you can use the Fleet Management KPI file, downloadable here.

**Step 7: Assess Again**

Implementing the standards up to the Professional level will normally take an organisation up to three years. As organisations and the environment they operate in change over time, it is recommended that the assessment be conducted on a yearly basis. This will lead to continuous improvement of the level of fleet management in the organisation, as pictured in the following figure.

**Tip:** A good way to assess the qualitative performance is to conduct stakeholder satisfaction surveys on a regular basis. The way that your stakeholders (drivers, programme staff, senior management) perceive the services that you provide will provide a lot of insight.
Assessing the fleet management standards on a yearly basis will also help the organisation to move from one standard level to another. The following table makes recommendations as to when to move to a higher level.

<table>
<thead>
<tr>
<th>Current level</th>
<th>Score “Policy and Procedure”</th>
<th>Score “Practical Implementation”</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Standards</td>
<td>120</td>
<td>120</td>
<td>Keep the Basic Standards in place and move to Advanced Standards</td>
</tr>
<tr>
<td>Advanced</td>
<td>50</td>
<td>50</td>
<td>Keep Basic and Advanced in place and move to Professional</td>
</tr>
<tr>
<td>Professional</td>
<td>24</td>
<td>24</td>
<td>Keep all standards in place</td>
</tr>
</tbody>
</table>

The Humanitarian Fleet Management Standards

In this section the Basic, Professional, and Advanced Standards are described, including the purpose of the standard (Why) and how organisations can demonstrate that a standard is in place (Demonstrated By).

Definitions in the Standards

**Drivers** - The term “drivers” refers to employees driving an organisation-owned, leased, or hired vehicle as well as riders of two-wheeled means of transportation. This also includes employees who drive their private vehicle for business purposes.

**Policy** - A policy is a principle or protocol to guide decisions and achieve rational outcomes. A policy is a statement of intent, and it is implemented as a procedure or protocol.

**Procedure** - A procedure is a document written to support a policy. A procedure is designed to describe Who, What, Where, When, and Why by means of establishing corporate accountability in support of the implementation of a policy.

**Shall** – To indicate something that is mandatory.

**Should** – To indicate something that is recommended.

**Strategy** - A plan for achieving a particular goal, usually over a long period of time.

**Subcontractor** - Any organisation that performs vehicle-related tasks on behalf of the organisation. Examples are: taxi companies, implementing partners.
Basic Standards

**Standard 1:** The organisation should have a fleet management strategy in place that describes how vehicle fleets support the mandate/programme objectives of the organisation.  
**Why:** To ensure that fleets support organisational/programme objectives.  
**Demonstrated By:** Written strategy document.

**Standard 2:** Appointment of a senior manager who will be accountable and responsible for managing and executing the fleet strategy.  
**Why:** To ensure that the principles of cost effectiveness and value for money are applied and anchored within the organisation’s culture at the highest level, and to provide line authority to ensure resources are used effectively and that due weight is given to cost effectiveness.  
**Demonstrated By:** Documented evidence of organisational structure and responsibilities.

**Standard 3:** A senior manager is accountable and responsible for fleet and road safety.  
**Why:** To ensure that fleet and road safety is on the organisation’s agenda at the highest level and provides the appropriate executive line authority to allocation of resources and for the approval of plans to enable the organisation to act.  
**Demonstrated By:** Documented evidence of organisational structure and responsibilities.

**Standard 4:** The organisation should have a framework for accountability and responsibility in place that specifies for each member of staff what the fleet management responsibilities are.  
**Why:** To ensure that there are tangible links between staff responsibility and fleet performance.  
**Demonstrated By:** Documented evidence of organisational structure and responsibilities.

**Standard 5:** The organisation should demonstrate that policies, procedures, and responsibilities are communicated to staff.  
**Why:** To ensure that staff understands the policies, procedures, and responsibilities and that they can work to them.  
**Demonstrated By:** Documented evidence can include the organisation’s policies, procedures, and responsibilities being distributed to staff and staff training and/or policies being posted in areas where staff can view them.

**Standard 6:** The organisation shall set key performance indicators and initiate active monitoring.  
**Why:** To ensure that fleet performance can be objectively measured and that improvement actions take place when needed that will allow continuous improvement.  
**Demonstrated By:** Documented evidence of the KPIs as well as evidence that the KPI has been communicated to relevant staff.

**Standard 7:** The organisation should monitor whether the staff is compliant to the policy and procedures.  
**Why:** To ensure that actions have taken place in case of non-compliance.  
**Demonstrated By:** A review schedule should be documented, as well as the review meeting minutes.

**Standard 8:** The organisation shall put in place clear, transparent, and robust procurement procedures and processes with specific, measurable, appropriate, and relevant specifications.  
**Why:** To ensure balance between vehicle capabilities, environmental impact, health and safety, and cost considerations.  
**Demonstrated By:** Documented evidence of procedures as well as evidence that the procedures have been communicated to relevant staff.
**Basic Standards (continued)**

**Standard 9:** The organisation should have procedures in place that support selection and specification of vehicles that are suitable and safe for staff and the type of trips they are expected to undertake.

*Why:* To ensure better understanding of the types of vehicles that are required and to inform the final decision-making process.

*Demonstrated By:* Documented evidence of fleet safety selection and specification procedures.

**Standard 10:** The organisation should have effective policies and procedures to control how fleet vehicles are used.

*Why:* To ensure adequate controls are in place to ensure that vehicles are used for legitimate purposes associated with organisational/programme objectives.

*Demonstrated By:* Documented evidence of policies and procedures about vehicle use and evidence that the policies and procedures are communicated to staff.

**Standard 11:** The organisation shall ensure policies, procedures, and systems are in place to capture financial spend data.

*Why:* To ensure the organisation has accurate data defining the Whole Life cost of each vehicle to facilitate fact-based decision making to optimise fleet costs and balance these costs with programme objectives.

*Demonstrated By:* A database with comprehensive and accurate financial data allocated vehicle by vehicle.

**Standard 12:** The organisation shall ensure accurate base data is collected for every vehicle in the fleet, including vehicle type, make, model, registration, engine and VIN number, geographical location, allocated driver, service and accident history, and km driven.

*Why:* To ensure the organisation maintains accurate information about the size, composition, and disposition of its fleet to enable fact-based decision making on both deployment and optimisation of the fleet.

*Demonstrated By:* A database with comprehensive and accurate fleet data. The database should lend itself for statistical analysis.

**Standard 13:** The organisation shall have a fleet safety policy including organisational design, selection of people and drivers, vehicles, and equipment.

*Why:* To ensure that the organisation’s ambition for fleet safety and staff responsibilities are defined and can be communicated.

*Demonstrated By:* Written policy document.

**Standard 14:** The organisation should define a driving policy that covers driver responsibilities, speed limits, vulnerable road users, safety equipment, use of seatbelts, use of mobile phones, alcohol and drugs, and fatigue.

*Why:* To ensure that staff responsibilities are defined and communicated.

*Demonstrated By:* The driving policy should be shared with all staff driving for official purposes. Drivers should be re-briefed after updates, and minutes of re-briefing should be documented.

**Standard 15:** The organisation should have policies and procedures to manage both driving hours and total working time.

*Why:* To ensure that drivers are sufficiently alert so that they drive in a safe manner.

*Demonstrated By:* Documented evidence of planning shifts for drivers to ensure drivers’ hours and working time regulations are respected.

**Standard 16:** The organisation should integrate necessary safe driving criteria into the overall Terms of Reference for professional drivers and for staff that drives for official purposes.

*Why:* To ensure that employees are capable and safe drivers.

*Demonstrated By:* Evidence could include Terms of Reference in which safe driving criteria is included, copies of valid driver’s licences, documented reference checks, documented past accident and prosecution history, documented “fit to drive” certificates, documented on-road-assessments, documented results of rules and regulations tests.
**Standard 17:** The organisation should have a procedure for recruiting and selecting drivers.

**Why:** To ensure that recruited drivers are capable and safe drivers.

**Demonstrated By:** Documented evidence of the driver selection procedure. Organisations should also have documented evidence that the drivers are selected against the driver requirements.

**Standard 18:** The organisation should have initial induction training, coupled with on-going training and development for all staff related to fleet functions throughout their time in the organisation.

**Why:** To ensure that all staff have the appropriate regulatory knowledge and skills to competently conduct their duties.

**Demonstrated By:** Documented evidence of the induction training and driver training plans.

**Standard 19:** The organisation should conduct driver medical checks once every 12 months.

**Why:** To ensure the safety of drivers, passengers, and the public from occupational and lifestyle-related health issues.

**Demonstrated By:** Documented evidence of the yearly fitness checks in the personal file of all staff that drive for business/official purposes.

**Standard 20:** The organisation should provide drivers with handbooks in which driving rules and regulations are stated.

**Why:** To ensure that drivers know what is expected of them from a safety perspective and to help explain to drivers the importance of safe driving.

**Demonstrated By:** Documented evidence that the handbooks are handed out to the drivers. Organisations should also keep documented evidence that the drivers are tested on their comprehension of the handbook.

**Standard 21:** The organisation should have a planned approach to vehicle maintenance, including daily and weekly checks as well as planned maintenance programmes with clear standards and minimum periods between services.

**Why:** To reduce the risks of being a danger on the road and a vehicle breakdown.

**Demonstrated By:** Records of the maintenance plan.

**Standard 22:** The organisation should ensure that pre-defined safety equipment is available in all vehicles and that the safety equipment is inspected and serviced to manufacturer’s requirements.

**Why:** To ensure that safety equipment is in good working order to comply with safety requirements.

**Demonstrated By:** Documented evidence of inspection and service records.

**Standard 23:** The organisation shall ensure that vehicles are safely loaded.

**Why:** To ensure that vehicle loads in normal and emergency situations do not cause a hazard.

**Demonstrated By:** Documented evidence of the risk assessment of the type of load carried by each vehicle (dimensions, weight, and movement), providing proper loading equipment, and records of communicating safe loading instructions to staff.

**Standard 24:** The organisation shall have a policy in place to manage specific journey-related risks such as night driving, use of higher-risk routes and areas, weather conditions, etc.

**Why:** To mitigate risks to staff and other road users.

**Demonstrated By:** Documented evidence of the journey scheduling policy and that the policy has been communicated to staff.
**Standard 25:** The organisation should have a system in place that ensures that journeys are properly authorised and that in the event of an incident or delay appropriate response can be put into effect.

*Why:* To reduce risks to staff and other road users.

*Demonstrated By:* The organisation should keep records of the authorized journey schedules. The organisations should keep documented evidence of the response mechanism in the event of an incident or delay.

**Standard 26:** The organisation should have defined disposal policies and procedures in place to remarket vehicles, whether because the vehicle is at the end of its economic life or because of changes in the programme transport requirements.

*Why:* To ensure that the organisation has transparent, auditable, and effective procedures in place to maximise revenues from the sale of disposed vehicles and to demonstrate effective use of donor funding.

*Demonstrated By:* Documented plans with transparent, auditable processes and clear tracking mechanisms to maximise resale values, including roles, responsibilities, reporting lines, performance management, and management information reporting.

**Standard 27:** The organisation shall ensure that there is an accident and incident response system in place that lays out roles and responsibilities as well as response time.

*Why:* To establish guidelines for responding to an accident and to ensure accurate and consistent reporting of information concerning the accident.

*Demonstrated By:* Documented evidence of the guidelines as well as evidence of the guidelines being communicated to staff.

**Standard 28:** The organisation shall ensure that accidents and incidents are recorded.

*Why:* To ensure that all accidents and incidents are managed in a consistent manner and that evidence is captured.

*Demonstrated By:* Evidence of recorded accidents and incidents.

**Standard 29:** When outsourcing transportation, the organisation should consider road and fleet safety criteria in the selection procedure.

*Why:* To ensure all transport suppliers providing services to the organisation have safety standards in place and to reduce the organisational risk of damage to reputation.

*Demonstrated By:* Recorded evidence of transport tender documents.

**Standard 30:** The organisation shall carry out a Whole Life Cost Analysis on every vehicle in the fleet and regularly review these analyses, focusing on the Total Holding Cost of each vehicle in terms of $/km and $/unit time.

*Why:* To ensure informed decision-making about when to retire aging vehicles from the fleet, enabling the fleet manager to optimise costs and ensure optimal operational readiness.

*Demonstrated By:* Documented evidence of historical costs per vehicle and mapping likely future costs.

**Standard 31:** The organisation shall review their fleet and road safety management system at least every 12 months by senior management.

*Why:* To ensure that senior management are engaged in reviewing the fleet and road safety management system of the organisation, that there is management commitment to keep up the standards, and for continuous improvement of the organisation's performance.

*Demonstrated By:* A review schedule should be documented as well as the review meeting minutes.

**Standard 32:** The organisation should measure the environmental impact of their fleet (coming from fuel consumption and emissions) of all vehicles at least annually.

*Why:* To ensure that fuel consumption and reduction in emissions is measured against targets and to take appropriate measures when needed.

*Demonstrated By:* A documented review schedule as well as the review meeting minutes and action points.
## Advanced Standards

**Standard 1:** The organisation should have an on-going strategy in place to reduce the emissions of their fleet.  
**Why:** To ensure continuous improvement in the emissions of fleet.  
**Demonstrated By:** Written strategy document.

**Standard 2:** A full and comprehensive hazard identification and risk assessment will be carried out and should be reviewed at least annually as part of the management review.  
**Why:** To ensure that organisations identify risks and are able to take measures to mitigate the fleet and road safety risks.  
**Demonstrated By:** A review schedule should be documented, as well as the review meeting minutes.

**Standard 3:** Procedures need to be in place to select, evaluate, and implement measures that eliminate or control risks. Measures should include actions that prevent the escalation of any incidents that do occur through an effective emergency response plan.  
**Why:** To ensure that organisations identify risks and are able to take measures to mitigate the fleet and road safety risks.  
**Demonstrated By:** A review schedule should be documented, as well as the review meeting minutes.

**Standard 4:** The organisation should have a fuel policy in place, including targets for fuel consumption.  
**Why:** To ensure that the fuel(s) used suits the fleet requirements, taking into account fuel consumption, environmental performance, fuel costs, refuelling infrastructure, and residual values.  
**Demonstrated By:** A written policy document.

**Standard 5:** The organisation should have a policy in place for workshops regarding disposal of fluids and waste (including old spare parts).  
**Why:** To ensure that the environmental impact of workshops will be minimised.  
**Demonstrated By:** A written policy document.

**Standard 6:** The organisation should inform their subcontractors about the road and fleet safety policy and how transporters are expected to behave when driving on behalf of the organisation.  
**Why:** To ensure that transport suppliers know what is expected of them.  
**Demonstrated By:** Documented evidence can include the organisation’s policies, procedures, and responsibilities being distributed to staff of subcontractors.

**Standard 7:** The organisation should have a system in place setting out what checks and inspections need to be carried out, with what frequency, and by whom. This will include pre-trip checks, inter-trip checks, and post-trip checks.  
**Why:** To ensure that vehicles are inspected for safety and defects are rectified to ensure safety.  
**Demonstrated By:** Documented records of the vehicle checks; (internal) auditors may witness such checks being undertaken by randomly selected drivers.

**Standard 8:** The organisation should have route plans in place that identify hazards along a road and provide guidance for each hazard identified.  
**Why:** To reduce the risk to staff and other road users.  
**Demonstrated By:** Documented evidence of the route plans and evidence that the plans are communicated to drivers and staff.

**Standard 9:** Organisations must demonstrate a credible plan to maintain the fleet throughout its life, considering availability of spare parts, tyres, trained technicians, special tools, and diagnostic equipment.  
**Why:** To ensure balance between vehicle capabilities, the environmental impact, health and safety, and cost considerations.  
**Demonstrated By:** Documented evidence of service plans, including roles and responsibilities, use of outsourcing, quality assurance measures, controls on maintenance spend, and addressing access to spare parts, trained technicians, special equipment, diagnostic tools, and technical support.
Advanced Standards (continued)

**Standard 10:** Organisations should establish eco-driving training for all staff that drive for business purposes.  
**Why:** To reduce fuel consumption and emissions by improving driver skills.  
**Demonstrated By:** Documented evidence of eco-driving training and driver training plans, including performance in personal file.

**Standard 11:** Organisations shall ensure that privately owned vehicles that are used for official purposes are fit for the purpose, are insured for official use, comply with local regulatory requirements, have a servicing record, and are roadworthy.  
**Why:** To mitigate organisational liability risk when privately owned vehicles are involved in accidents.  
**Demonstrated By:** Documented records of vehicle checks, insurance, and servicing records.

**Standard 12:** Organisations should review driver performance at least once a year.  
**Why:** To ensure drivers’ compliance with policies, procedures, and standards and to identify training and development needs of drivers.  
**Demonstrated By:** A review schedule should be documented, as well as the individual performance appraisal reports.

**Standard 13:** Organisations shall ensure that the reported accidents and incidents are analysed and that corrective actions are implemented.  
**Why:** To avoid accidents in the future.  
**Demonstrated By:** Evidence of recorded accidents and incidents and evidence of the content of the records being reviewed and reacted on.

**Standard 14:** Organisations should measure the fleet safety performance at least once a year.  
**Why:** To ensure that performance is measured against targets and take appropriate measures when needed.  
**Demonstrated By:** A review schedule should be documented as well as the review meeting minutes.

Professional Standards continue on following page.
**Professional Standards**

**Standard 1:** The organisation should have a policy that highlights the requirements for employees to use the most economic and efficient method of travel, taking into account the cost of travel, environmental impact, and timing factors.

*Why:* To ensure that the vehicles are fit for the purpose and at the same time to minimise fuel consumption and safety risks.

*Demonstrated By:* A written policy document.

**Standard 2:** The organisation should have an appropriate driver reward and recognition scheme in place.

*Why:* To motivate drivers to the desired level of performance and to recognise significant achievements from staff.

*Demonstrated By:* Documented evidence that the reward and recognition scheme is communicated to all staff. Results of the award and recognition scheme should be visibly displayed in the organisation.

**Standard 3:** The organisation should purchase fuel that is of the highest quality possible in the country of operations.

*Why:* To ensure that the fuel used has the lowest possible impact on the global and local environment.

*Demonstrated By:* Documented evidence that fuel has been bought from trustworthy and known distributors.

**Standard 4:** The organisation shall ensure that near misses are recorded and analysed and that corrective actions are implemented.

*Why:* To avoid accidents and incidents from happening in the future.

*Demonstrated By:* Evidence of recorded near misses and evidence of the content of the records being reviewed and reacted on.

**Standard 5:** The organisation should review the contractors’ safety performance at least once every 12 months.

*Why:* To ensure contractors’ compliance with policies, procedures, and standards and to identify areas for improvement.

*Demonstrated By:* A review schedule should be documented as well as the transporters’ performance reports. This can also include self-assessments, driver performance, etc.

**Standard 6:** The organisation should audit their fleet management system at least once a year by external auditors.

*Why:* To ensure that the fleet management system is effective.

*Demonstrated By:* A documented audit report, including recommendations, should be available.