Behind the Wheel Driver Evaluation Program

Christian Brothers Risk Management Services
Program Steps for RPT Members

Christian Brothers Risk Management Services (CBRMS) offers Behind the Wheel Driver Evaluations for eligible members of the Risk Pooling Trust. This service is being offered to provide leadership with an impartial, point-in-time evaluation of their religious drivers’ ability to drive safely. Each evaluation will last approximately 50-55 minutes. The evaluation includes a variety of on the road maneuvers and written cognitive exercise the driver must complete. The evaluator will provide leadership with a list of observations, recommendations, restrictions, and whether or not the driver should continue driving.

CBRMS has found drivers who complete and perform poorly on the Roadwise Review program also do poorly on the Behind the Wheel Evaluation. The Order should seriously consider completing the Roadwise Review Program with each driver before the Behind the Wheel Driver Evaluation is conducted. The results from this program should also be provided to the evaluator prior to the Behind the Wheel Evaluation being conducted. CBRMS can provide you with the CD Rom Program “Roadwise Review” or the program can be accessed online at


This program would not be for drivers who have limited ability to use a computer or feel uncomfortable using a computer.

Conditions of Eligibility

There is a limited capacity in the number of evaluations Christian Brothers Risk Management Services can provide. The following conditions must be met before evaluations can be scheduled and completed:

1. The Order is to complete the Christian Brothers Risk Management “Online Auto Assessment” and review with the Risk Control Specialist to review the results.

https://db.cbservices.org/CBSAdmin.nsf/SignInAuto?OpenForm

2. Leadership is to provide a signed copy of the Behind the Wheel Driver Evaluation acknowledgment form prior to the scheduling of evaluations.
3. Leadership is to be available to review the results following the evaluations.
4. The driver needs to be at least 75 years of age. If the order needs to evaluate a driver under the age of 75, an explanation will be needed for that driver. Examples can include:
   a. Driver has had a recent accident or ticket
b. Number of near misses
c. Poor driving behavior has been reported

5. Driver needs to have a valid State Driver’s license.
6. The order is currently engaged in ongoing driver awareness training for their drivers.
7. The driver needs to have had an eye exam within the last year.
8. The order is registered to use Christian Brothers Services’ online web training platform. Also, Orders agree to have their drivers assigned an appropriate online training module if and when they are involved in an automobile accident.
9. The driver is a religious driver and drives vehicles covered through the Risk Pooling Trust.

CBRMS Behind the wheel evaluators are not qualified to:

- Reevaluate a driver that a Risk Control Specialist has already recommended should stop driving.
- Evaluate a driver who has failed any other Behind the Wheel Driver Evaluation.
- Evaluate a driver leadership feels should not be driving and they themselves would not ride with.
- Evaluate a driver following a medical/psychological circumstance where the driver was informed not to drive during their recuperation. A release from the treating doctor stating it is permissible for this individual to drive needs to be provided.
- Evaluate a driver who only has an international driver’s license.
- Evaluate a driver who is not a member of the Religious Order.

**Scheduling the Behind the Wheel Driver Evaluations**

1. Reserve the date(s) and times with your Risk Control Specialist and verify how many drivers need to be evaluated. If you do not know who your Risk Control Specialist is please contact Laura Hart at (800) 807-0300 ext 2543 and provide her with your Risk Pooling Trust location code.
2. Drivers need to provide their own car or a car they are familiar.
3. The Risk Control Specialist will need a small private office, (preferably close access to the driver’s vehicles and with internet access) where they can set up a computer. Part of the evaluation will require the drivers to sit at a table or desk and complete written exercises.
4. The daily schedule must be confirmed with the Risk Control Specialist prior to scheduling drivers. Adjustment in the normal 1 hour scheduling time might be needed due to the types of traffic patterns and road types in the area.
5. The Order will be responsible for scheduling their drivers to fill in time slots and for informing the drivers of the entire evaluation process. It is recommended only 7 drivers be scheduled during the day. Each driver should be scheduled for every hour consecutively. Although it is understandable a last minute
cancelation/change can occur, it is important to try to fill in the time slots and not leave gaps between evaluations.

6. Leadership must provide a completed Acknowledgment form to the Risk Control Specialist before the evaluations are scheduled. (See Attached)

7. Prior to the evaluation, Leadership must decide how the results are going to be conveyed to the driver. The options are:
   a. **CBRMS Preferred Method Option 1**: At the end of each evaluation, the driver **will be** informed of any observations and recommendations they should work on to be a better driver. However, this **will not** include whether they pass or failed the evaluation. Leadership will be informed of the pass fail results and be responsible for conveying those final results to the driver.
   b. **Option 2**: At the end of each evaluation, the driver **will not** be informed of any observations or recommendations by the evaluator. The results will be provided to Leadership at the end of the day for Leadership to convey to the driver.
   c. **Option 3**: At the end of the evaluation the driver **will be** informed of any observations, recommendations and whether they pass or fail.

8. Leadership and the evaluator need to agree on a plan on how a failed driver is to be handled. There are three ways an evaluator can fail a driver and recommend they no longer drive. These ways are as follows:
   a. During the “Behind the Wheel” portion of the evaluation, the evaluator finds themselves uncomfortable and with an unacceptable amount of risk. The evaluator at that time asks the driver to stop driving so the evaluator can switch seats with the driver and drive the car back to the starting point.
   b. Following the “Behind the Wheel” portion of the evaluation, the evaluator reflects on all recommendations, observations, exercises, driver summary information, etc… and the evaluator determines the driver should not drive.
   c. Following the “Behind the Wheel” portion of the evaluation and during the discussion step with Leadership, the evaluator and Leadership decide it is best for the driver to be asked to discontinue driving.
   d. Discussion points to consider when developing the plan:
      i. When does leadership want to be informed? Immediately after the completion of the evaluation or at the end of the day. (It is recommended for Leadership to be present when a driver will be informed to consider discontinuing their driving.)
      ii. Does the driver have any immediate driving needs? Example: Will the driver be going back to work following the evaluation? Were they expecting to drive home following the evaluation and will they be allowed to drive home or will someone else drive them?

9. The Behind the Wheel Evaluation process (provided on the last page of this packet) should be provided to all drivers before the evaluation.
This form is an outline of the Christian Brothers Risk Management Services, “Behind the Wheel Evaluation Process.”

1. You have reviewed the Conditions of Eligibility.
2. Leadership contacts are available to review the results with the Risk Control Specialist following each day’s evaluation:
   - Leadership Contact Person: __________________________
   - Contact Phone Number: ____________________________
   - Contact Email Address: ____________________________

3. In the event a driver fails, the evaluator should speak with ______________ immediately.
4. Christian Brothers Risk Management Services Online Auto Assessment was completed on ____________________________.
5. Please explain how the Order is currently providing ongoing driver awareness training to their membership?
   ____________________________________________________________________
   ____________________________________________________________________
   ____________________________________________________________________

6. Before evaluations begin, Leadership and the Risk Control Specialist must determine how the results will be conveyed to the driver.
7. Did you review or provide the Behind the Wheel Evaluation process with each of the drivers who will be evaluated? Yes or No If not, will you review the process with them.
8. The evaluator needs to be provided with a copy of the driver’s results from taking the Roadwise Review if the program was completed.
9. The evaluator needs to be provided with a copy of the driver’s last evaluation if one was completed.

I understand and agree to follow the procedures listed above.

Location Code: _______________________________________________________
Affiliate Name: _______________________________________________________
Address: _____________________________________________________________
Signature: ____________________________________ Date: _____________
Title: ________________________________________________________________
Behind the Wheel Evaluation Process

Below is the process to be followed for the Behind the Wheel Evaluation. If you have any questions you can discuss these with the Evaluator prior to starting the evaluation process.

1. **Introductions.**
2. The evaluator will discuss the following:
   a. Driver’s License Status.
   b. Are you aware of why this evaluation is being conducted?
   c. Do you have any health issues that impact your driving?
   d. Any driving limitations either you or someone else has placed on you (example: You will not drive at night.)
   e. Any accidents in the last 5 years?
   f. Any citations in the last 5 years?
   g. Do you wear hearing aids?
   h. When was your last eye exam?
3. The evaluator will review how Leadership would like the results conveyed.
4. The evaluator will review the process if they are involved in an accident during the evaluation.
5. The evaluator will explain at any point in time they feel uncomfortable, they may ask to have you pull the vehicle over in a safe area and the evaluator will drive the vehicle back.
6. Complete cognitive written exercise(s).
7. Review the driving route.
8. Complete the Behind the Wheel Evaluation using your car or a car you are familiar.
9. Evaluator will review results with Leadership at the end of the day.

Questions?
<table>
<thead>
<tr>
<th>Loc Name/Code:</th>
<th>Date:</th>
<th>Evaluator:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driver Name:</td>
<td>Age:</td>
<td>Date of Birth:</td>
</tr>
<tr>
<td>Driver License No:</td>
<td>State:</td>
<td>Expiration Date:</td>
</tr>
<tr>
<td>Hearing Aid:</td>
<td>Yes ☐ No ☐</td>
<td>Date of Last Eye Exam:</td>
</tr>
<tr>
<td>List Any Medical Conditions that Affect Your Driving and list any driver license restrictions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has a Doctor or anyone else ever told you not to drive? Yes ☐ No ☐ Why:</td>
<td></td>
<td></td>
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<tr>
<td>List Driver Concerns or Limitations:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Accidents Last 5 Years?</td>
<td>Number of Citations Last 5 Years?</td>
<td></td>
</tr>
<tr>
<td>Previous Evaluations/Date:</td>
<td>Pass ☐ Fail ☐ Restrictions:</td>
<td></td>
</tr>
</tbody>
</table>

**HANDS ON EVALUATION**

<table>
<thead>
<tr>
<th>Clock Test</th>
<th>Comments/Red Flags:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trail Making Test B</td>
<td>Time:</td>
</tr>
</tbody>
</table>

**Road Wise Review Comments:**

<table>
<thead>
<tr>
<th>Needs Improvement</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Starting the Vehicle:</td>
<td></td>
</tr>
<tr>
<td>☐ Lane Changes:</td>
<td></td>
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<tr>
<td>☐ Steering and Turns:</td>
<td></td>
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<tr>
<td>☐ Intersections / Stopping:</td>
<td></td>
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<tr>
<td>☐ Open Road Driving / Freeway:</td>
<td></td>
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<tr>
<td>☐ Backing / Parking Lots:</td>
<td></td>
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<tr>
<td>☐ Speed:</td>
<td></td>
</tr>
</tbody>
</table>

**CONCLUSIONS / RECOMMENDATIONS**

<table>
<thead>
<tr>
<th>☐ Continue Driving</th>
<th>☐ Continue Driving with Restrictions</th>
<th>☐ Discontinue Driving</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Self Declared Restrictions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Additional Recommended Restrictions:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:**

(Evaluators Name) ___________________________ (Date) ___________________________

(Signature of Driver) ___________________________ (Date) ___________________________

**Please Note:** The above evaluation reflects the driving performance of the above-named person at the time of the evaluation on the above date; and is by no possible interpretation to be a guarantee, nor can it be in any manner intended to mean that this individual can not or will not improve or digress in the driving performance observed at this evaluation.
August 9, 2011

Contact, Member address

Location: Member Name (XXX-XXX)
City/State: Chicago Illinois
Subject: Behind the Wheel Evaluations

Dear :

This letter serves as confirmation of the recent behind the wheel driver evaluation session(s), provided to (member name) on (date(s)) by Christian Brothers Services. Each evaluation consisted of two cognitive exercises and a riding a behind the wheel road test. During the time spent with each driver, I observed driving in a variety of traffic conditions in the area. These traffic conditions may have included highway/local (in-town)/residential driving, construction zones, parking lots, and a variety of stopping and turning situations.

The evaluation forms for each of your driver participants are included with this letter (or have been emailed/provided to you following the day’s evaluations). The pass/fail results have not been communicated to each of the drivers, however my verbal observations and driver recommendations have. Each form can be shared and reviewed with the driver at your discretion. At the bottom of each form, our agreed upon conclusion stating whether the driver can continue or discontinue their driving has been added for you to also discuss with each driver. The following summary is our end results for each Driver:

<table>
<thead>
<tr>
<th>Driver Name</th>
<th>Date of Evaluation</th>
<th>Recommended Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sister Mary Doe</td>
<td>June 9, 2011</td>
<td>Continue Driving</td>
</tr>
<tr>
<td>Sister Connie Smith</td>
<td>June 9, 2011</td>
<td>Continue Driving with Restrictions</td>
</tr>
<tr>
<td>Sister Gemma Johnson</td>
<td>June 10, 2011</td>
<td>Discontinue Driving</td>
</tr>
</tbody>
</table>

I would like to take this opportunity to thank you, and all of those who participated in the program for the courtesies I was shown during my visit. If you have any questions about this letter, the driver evaluation forms or need any further information, please feel free to contact me at (add phone number).

Sincerely,
Risk Control Specialist

cc: Account Manager