



TRAIN THE TRAINER · PARTICIPANT PACKET

Leading The Way

Building Better Drivers

Lead Driver Training

Panhandle Express, LLC

Name: _____

Date: _____

LEADING THE WAY · LEAD DRIVER TRAINING



What is in this book

Keep it in the truck. The front is the course. Everything behind page 15 is the Panhandle Express training program exactly as it is filed.

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The online module. The clips, the scored practice and the certificate live at **pex-leading-the-way.netlify.app**.

THE SESSION

Agenda • two hours

Two hours, start to finish. The scored practice is the longest block on purpose, because it is the only part of this you cannot learn from a handout.

TIME	BLOCK	WHAT HAPPENS
0:00	Why you are here	The job of the right seat, and the four things a mentor does. What a new driver learns about this company in his first week, and who he learns it from.
0:08	What to look for	The seven behaviors the cameras score every day, and the warning signs for each one from the passenger seat.
0:20	How to ride	Not becoming the distraction. Watching the driver instead of the road. Letting him drive. Saying the good things out loud.
0:28	The four responses	Stop the trip. Correct it now. Wait for the next stop. Nothing to correct.
0:35	Scored practice	Eight real rides, no labels. Name the behavior, pick the moment, get scored. The standard is 12 of 16.
1:10	Negativity: what it costs us	What negativity does to a new driver, and why it never shows up in our turnover numbers as negativity. Group activity.
1:22	Coach with purpose	Coaching versus discipline. A real Panhandle Express training ride that ended in a ditch, on four cameras.
1:38	Asking questions	The six question types that kill a coaching conversation, and how to rephrase each one on the spot.
1:48	Documentation	Which form goes with which trainee, and how to fill it out fully and fast.
1:56	Certification	Observation, conversation, documentation. Certificates issued.

No break. Two hours, straight through. If you need to step out, step out, but the practice block is scored and you cannot make it up later.

THE STANDARD

What we expect from a Lead Driver

You are not a passenger and you are not a second driver. You are an observer with a job, and the company is accountable for what you sign off on.

NON-NEGOTIABLE

- **Team driving is strictly prohibited.** You are required to be in the front passenger seat when the trainee is driving.
- If a trainee demonstrates unsafe behavior, training stops and you provide guidance immediately.
- If the guidance is ignored, or the unsafe act repeats, you report it to the Safety Coordinator that day.
- You never sign off on a skill you did not personally watch.

THE NEW DRIVER EXPERIENCE

Purpose: to train, instill culture, communicate, and keep people safe. Simply put, to make sure new drivers are set up to succeed.

Expectations: pro Panhandle, support, trainee success, follow up.

The Lead Driver: communication and accountability with every stakeholder.

Retention of new drivers reduces the velocity of the whirlwind.

ACCOUNTABILITIES

- Safe and legal operation of a commercial motor vehicle
- Timely transportation of freight from origin to destination
- Proper loading and unloading, with minimal risk to cargo and people
- Proper handling and accurate completion of all trip paperwork
- Professional representation of the company through responsible driving
- Cooperation with managers, supervisors and corporate staff

INSTRUCTOR ELIGIBILITY

- CDL of the same class or higher, with the endorsements needed for the vehicle being trained on
- No preventable accidents in the past three years
- No moving violation convictions in the past two years
- Not under any company disciplinary action
- Able to communicate clearly with a trainee
- Familiar with company operations
- Completed this Train-the-Trainer course

"A mentor is someone who sees more talent and ability within you than you see in yourself, and helps bring it out of you."

Bob Proctor

FIELD REFERENCE

The seven behaviors

These are scored on every driver, every day, by the cameras. Your job in the right seat is to find them first. Run all seven every ride, not just the one that caught your eye.

1 • DISTRACTED DRIVING

- Looking at a phone, texting, browsing
- Eating or drinking
- Turning to face a passenger
- Working the radio, nav or climate excessively
- Grooming
- Reading maps or paperwork while rolling

2 • STOP SIGNS AND RED LIGHTS

- No complete stop at the stop line
- Rolling a stop sign without pausing
- Proceeding after the light has changed
- Entering on yellow and not clearing before red

3 • SPEEDING

- Over the posted limit
- Too fast for conditions: rain, snow, traffic
- Rapid acceleration and braking in traffic
- Aggressive lane changes at speed

4 • SEAT BELT

- No shoulder strap across the chest
- No lap belt across the lap
- Belt hanging loose or tucked behind
- **Reflective stripes on a hi-vis shirt are not a seat belt.** Find the webbing or the buckle.

5 • FOLLOWING DISTANCE

- Less than the 2-second rule
- Cannot see the rear tires of the vehicle ahead when stopped
- Closing distance rapidly
- Following too closely in bad weather

6 • NEAR MISS

- Sudden aggressive braking to avoid an incident
- Sharp swerving around a vehicle or obstacle
- Evasive steering to avoid a collision
- Tire squeal from a sudden stop or turn

7 • FATIGUE

- Frequent yawning, rubbing eyes
- Heavy eyelids, trouble keeping eyes open
- Head nodding or drooping
- Weaving in the lane, drifting over the markers
- Delayed reaction to signals or traffic
- Missing exits or signs

THE HABIT TO BREAK

Most trainers find one behavior, feel good about catching something, and stop looking. Half the rides in the scored practice carry more than one behavior at the same time, and one of them carries three.

FIELD REFERENCE

What you do, and when

Seeing it is half the job. The wrong timing turns a coaching moment into a crash, so the response is scored separately from the behavior.

RESPONSE	USE IT WHEN	WATCH OUT FOR
Stop the trip now	Immediate danger. Fatigue, impairment, anything where the next mile is the problem.	Talking yourself into "he is probably fine, we are almost there."
Correct it right now	It is safe for you to speak, no maneuver is in progress, and waiting simply lets the behavior repeat.	Staying quiet to avoid friction. Your silence teaches him the rule is optional.
Wait for the next stop	Speaking now would create a new hazard: mid-curve, mid-intersection, or right after a near miss when he is flooded.	Letting "next stop" quietly become "end of the week," or never.
Nothing to correct	He did it right. Somebody else caused it, or the camera flagged a good decision.	Correcting anyway. He learns you cannot tell the difference, and he stops telling you things.

TIMING IS A SAFETY SKILL

There is a version of a trainer who yells "you are way too fast" at a driver four seconds into a wet downhill curve at night, and puts the truck in the ditch. Note it, let him finish the ramp, address it parked. That is not politeness. That is the job.

AFTER A NEAR MISS, WAIT

The thirty seconds after a near miss is the worst teaching window there is. He is flooded, embarrassed and defensive, and anything you say lands as an attack. Let him get to a stop and breathe, then have the real conversation about what caused it.

Say the good things out loud. When he handles something well, name it in the moment. Most new drivers only ever hear from a trainer when they are wrong, and that is exactly how you teach a driver to hide things from you.

COACHING HANDOUT

The way a coach asks questions matters

Questions are powerful tools, and used wrong they damage the coaching conversation. There are six types to avoid. Learn to recognize them and rephrase on the spot.

AVOID · 1**Closed questions**

They get a yes or a no, and then the conversation is over.

"Do you have any other options?" · "Can you realistically text and drive?"

QUICK FIX

Restate the same question so it begins with **what** or **how**. That forces him to produce his own answer.

"**What** other options do you have?" · "**How** can you realistically text and drive?"

AVOID · 2**Solution questions**

Advice with a question mark stuck on the end. You are doing the thinking for him.

"Shouldn't you check with your boss first?" · "Do you think covering the camera is a good idea?" · "Can you give him the benefit of the doubt?"

QUICK FIX

Avoid **should, could, will, don't, can, are** followed by **you**. If *you* is the second word in your question, stop and reframe it.

"In our company, **what channels** do you need to go through before you do this?"

The one doing the most talking is the one doing the most learning. That is the whole point. Do not hand him an easy solution.

AVOID · 3

Rambling questions

Asking the same question three different ways. It usually means you are nervous, or the conversation has gone sideways, or he has gotten defensive.

QUICK FIX

- **Stop, think, then talk.** Give yourself a second to work it out.
- **Ask, then pause.** See where he chooses to take it.
- **Trust yourself.** Pause, reset, remember why you are there. You are there to help him.

AVOID · 4

The why question

Why puts a person on the defensive automatically.

"Why did you tailgate the vehicle in front of you?"

QUICK FIX

Change **why** to **what**.

"**What factors** are causing you to follow too closely?"

AVOID · 5

Rhetorical questions

Questions you do not actually expect an answer to. They show up when you have already formed an opinion about the man.

"What were you thinking?" · "Are you really going to throw away your career over this?"

QUICK FIX

Sit back and change your attitude before you say anything. Ask yourself:

- Do you see him as a person?
- Are you assuming good intentions?
- Or does it feel like he is doing this *to* you? We are focused on the behavior, not the man.

AVOID · 6

Interrupting behaviors

- **Interrupting:** commenting while he is still talking
- **Talking over:** continuing to talk while he is talking
- **Talking for:** finishing his sentences

Recap. Closed. Solution. Rambling. Why. Rhetorical. Interrupting. Pick one or two, get genuinely good at avoiding them, then pick up a few more. Learning to coach is a process too.

BEFORE THE CONVERSATION

Three universal questions

Lou Holtz believed every person asks three questions of the person they work for, whether they ever say them out loud or not. Answer these three and the coaching gets easier. Fail them and nothing you say will land.

Can I trust you?

**Are you
committed to
excellence?**

**Do you care about
me?**

Four things to carry in

BE HUMBLE

We sometimes think humility is weakness. Humility is really just holding your power back. You are his supervisor. You can be a lot of things. Be humble. Look in the mirror: you have made mistakes too.

DO NOT BE A VICTIM

Coaching the same behavior over and over gets frustrating. It is not a planned attack on you. It is a learned behavior, and you are the coach committed to developing this person.

ASSUME GOOD INTENTIONS

We all want to do great, and sometimes we fall short.

THEY NEED YOUR HELP

Focus on how you can help him and develop him.

Coaching is not discipline. Coaching gives people the **ability** to meet expectations. Discipline is for people who do not have the **will** to meet them. If you have gotten to discipline, this process is already over.

TRAINER CHEAT SHEET

Behind-the-Wheel Road Performance Guidelines

Every skill row on the Daily Assessment Form carries one of these letters. That is what makes “proficient” a defined standard instead of your opinion of him. A through I on this page.

A · TRIP PLANNING & PREPARATION

- Properly accepts trip from dispatch
- Plans driving time and rest breaks
- Verifies the accident kit is in the truck
- Reviews the permit book
- At least 8 days of log sheets in the vehicle
- Has the company fuel card
- Properly logs into the ELD
- Properly adjusts seat and mirrors

B · PRE- & POST-TRIP INSPECTIONS

- Completes pre and post trip inspections on components, parts and accessories necessary for safe operation
- Inspects cargo securement devices
- Inspects cargo securement

C · EN-ROUTE VEHICLE & CARGO INSPECTIONS

- Routinely completes en-route vehicle and cargo securement inspections each trip
- Identifies issues and takes corrective action

D · DRIVER VEHICLE INSPECTION REPORT

- Prepares a report at the completion of each day's work and when defects are discovered or reported
- Understands it is against company policy to operate an unsafe vehicle

E · VEHICLE CONTROL

- Left turns: signals early, positions the vehicle, controls tracking through the turn
- Right turns: signals early, protects the right side and lane
- Lane changes: signals, checks mirrors, keeps a safe following distance before, during and after
- Negotiates curves at highway speed and stays in the travel lane
- Entry and exit on the interstate: signals early, checks mirrors, adjusts speed for the flow

F · COMMUNICATIONS

- Proper technique for signaling intentions and communicating with other drivers
- Uses the horn when appropriate

G · DEFENSIVE DRIVING

- Visually searches the road and surroundings for hazards
- Maintains required following distance
- Keeps a 12 to 15 second eye lead time
- Scans mirrors every 5 to 8 seconds
- Changes eye focus every 3 to 5 seconds
- Avoids fixed stares
- Scans intersections before entering them
- Increases following distance in bad weather, at night, and after seeing a hazard
- Anticipates the actions of others
- Finds space around the vehicle to react

H · HOURS OF SERVICE / ELD

- 11 hours driving: manages driving time
- 10 consecutive hours rest: manages rest to reduce fatigue
- 30 minute break: manages rest breaks
- 14 hours on duty: manages on-duty time
- 70 hours in 8 days: manages driving and on-duty time
- Proper ELD use including edits and annotations
- ELD malfunction: keeps the instruction sheet and can describe reporting requirements
- Maintains at least 8 days of log sheets in the vehicle

I · RAILROAD CROSSINGS

- Recognizes potential dangers and demonstrates the appropriate safety procedures at crossings

TRAINER CHEAT SHEET

Guidelines, continued

J through R.

J · NIGHT OPERATION

- Explains the factors affecting safe CMV operation at night
- Demonstrates safe operation during changes in vision
- Properly adjusts speed and space, and uses lights correctly

K · EXTREME DRIVING CONDITIONS

- Demonstrates or explains safe operation in cold, heat and inclement weather, and on steep grades and sharp curves
- Where applicable, demonstrates tire chaining procedures

L · BACKING AND DOCKING

- Sets up to back safely and avoids blind side backing whenever possible
- Uses the GOAL method: get out and look
- Controls speed when backing
- Demonstrates safe backing and docking
- Communicates and uses a ground guide when available

M · SKID CONTROL, JACKKNIFE, EMERGENCIES

- Avoids skidding and jackknifing
- Explains maintaining directional control and stopping in the shortest distance
- Explains evasive steering, emergency braking and off-road recovery
- Explains response to brake failure, blowouts, hydroplaning and rollover

N · ROADSIDE INSPECTIONS

- Interacts appropriately with scale enforcement and law enforcement
- Provides all proper paperwork
- Reports all inspection violations to a supervisor immediately after
- Corrects all out-of-service deficiencies before operating

O · VEHICLE MAINTENANCE

- Explains the company's vehicle maintenance program

P · ACCIDENTS AND BREAKDOWNS

- Explains the company's accident handling procedures
- Explains the vehicle breakdown procedures
- Explains and demonstrates the use of emergency warning devices

Q · LOADING & UNLOADING

- Demonstrates proper loading procedures
- Understands company policy on shipper and receiver paperwork
- Documents shipping paperwork correctly when counting and securement cannot be completed
- Verifies the seal number against the bill of lading
- Obeys shipper and receiver safety guidelines

R · PERSONAL SAFETY & SECURITY

- Positions the body properly to lift the hood and use the landing gear
- Positions the body properly when disengaging the fifth wheel
- Uses proper lifting technique
- Uses three points of contact climbing up or down
- Locks doors and keeps windows up when leaving the vehicle
- Keeps aware of surroundings at truck stops and rest areas
- Parks in well lit areas

Read section G again. Mirror scans every 5 to 8 seconds. Eye focus changing every 3 to 5 seconds. You cannot score that from memory at the end of the week. You score it from the right seat, that day.

DRIVER TRAINEE PAPERWORK

Which form, for which trainee

Everything below lives in Drive under Panhandle Express / Driver Trainee Paperwork. The cheat sheet is used on every trainee. The checklist depends on what he is going to pull.

DOCUMENT	USE IT FOR
Trainer Cheat Sheet	Every trainee, every training day. Behind-the-Wheel Road Performance Guidelines A–R plus the Daily Assessment Form.
Belt checklist	New Belt Driver Training Checklist
Hopper checklist	New Hopper Driver Training Checklist
Bottom Dump checklist	Bottom Dump Driver Training Checklist
Liquid / Tanker checklist	New Liquid Driver Training Checklist
Booker checklist	Booker Trailer Driver Training Checklist
MWPMS checklist	Tickets, tank level photos, scale weights, and who to call
Walking Floor / End Dump	Equipment-specific checklists in the Lead Driver Training folder
Belt Floor Training	Step by step loading and unloading sign-off

A hopper driver signed off on a belt checklist is not signed off. Pull the right form before the ride starts, not after.

The signature chain

The form is not complete until four people have signed it: the **new driver**, the **lead driver**, the **Operations Manager** (with the number of days trained), and the **Safety Coordinator**. A completed form riding around in your truck for three weeks is an incomplete form, and that driver is not cleared.

FILL IT OUT FULLY AND FAST

Six rules

1 • DO IT IN THE TRUCK

Fill the form out before you climb down, while the day is still in your head. Four minutes now beats thirty minutes of guessing on Friday, and it is the only version that will be accurate.

2 • NO BLANK LINES. EVER.

If something did not apply, write N/A. A blank line reads as "skipped" to everyone who comes after you, and you will not be there to explain it.

3 • BEHAVIOR, NOT OPINION

"Backed into dock 14 twice, used GOAL both times, still setting up too shallow on the blind side" is useful. "Good driver" is not. If your comment could be written about anybody, it is worth nothing.

4 • SCORE HONESTLY ON DAY ONE

Marking a trainee proficient on the first day so the paperwork looks tidy destroys the only thing the record is for: showing that he improved and that you were watching.

5 • EVERY X GETS A COMMENT

An X in Needs Improvement requires a comment on the back, and the comment says what you did about it. A documented deficiency with no documented response is the worst sentence in the file.

6 • TURN IT IN THE DAY IT IS DONE

All four signatures. Until they are on it, the driver is not signed off and should not be running alone.

If you did not write it down, it did not happen.

A year from now nobody will remember day three of this driver's training. The paperwork is the only thing that survives the ride. It is what the Safety Coordinator reads before he signs off, what the next supervisor reads before putting him on a hard route, and what a plaintiff's attorney reads out loud to a jury, one blank line at a time.

DRIVER TRAINING SERIES

Load securement

The guiding principle of proper inspection and cargo securement is that both your equipment and your cargo are transported safely, under all conditions that could reasonably be expected in normal driving.

THE STANDARD

A driver must secure the product so that during normal and reasonable driving the product does not shift, spill, leak, blow out or otherwise leave the trailer.

Driver loading responsibilities

- **Tarping the load is required.**
- Tarps stay on the trailer both loaded and empty.
- Open the tarp **before** you fill the trailer.
- Seal the caps and confirm you are filling or emptying the correct tank. Liquid spills are 100 percent avoidable.

COACH IT FROM THE SEAT

Securement is one of the few things you can watch him do standing still, with all the time in the world to ask questions. Do not waste that. Make him walk you through why each step exists rather than watching him copy your motions.

TIES TO THE CHECKLIST

Cargo securement and weight distribution appear on the Daily Assessment Form under B and C, and loading and unloading under Q. Score them on the days he actually loads.

DRIVER TRAINING SERIES

Maintenance & inspection

49 CFR Part 396. Every motor carrier must follow maintenance procedures documented in a written plan, and every driver has a role in it.

§396.11(A) POST TRIP

Every driver shall prepare a written report at the completion of each day's work on each vehicle operated.

§396.13 PRE TRIP

Every driver shall be **satisfied** that the vehicle operated is in good repair and safe to operate, prior to use.

ROADSIDE INSPECTIONS

- The driver turns in the report as soon as possible
- The carrier repairs defective or hazardous items, signs the report and returns it to the issuing agency
- The carrier keeps a copy on file at least one year as a supporting document

REQUIRED INSPECTION ITEMS

Service brakes	Windshield wipers
Parking brakes	Windshield defroster
Steering mechanism	Rear vision mirrors
Lighting devices	Coupling devices
Reflectors and tape	Wheels and rims
Tires, using a gauge	Extinguisher & triangles
Horn	Spare fuses
Securement systems	ELD, if required

Teach the tire gauge. "Tires" on that list says *using a gauge*. A trainee who thumps a tire with a bar has not inspected it, and you signed the form that says he did.



Lead Driver Training

CDL FINISHING PROGRAM

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CDL FINISHING PROGRAM

PURPOSE

This program has been created to improve upon the knowledge, skills and experience of drivers that have less than two years of commercial driving experience. The intention of this training program is not to re-teach basic commercial driving skills, rather it is designed to build on those skills.

GOAL & OBJECTIVE

The goal of this program is to fill a need for more safe and competent commercial motor vehicle drivers for our company.

The objective for this program is to advance the knowledge and skills of commercial drivers that have less than two years of commercial driving experience.

ROLES AND RESPONSIBILITIES

Upper management is responsible for the oversight and success of the CDL Finishing Training Program.

The safety director is responsible for program design, implementation, and management of the CDL Finishing Training Program.

A driver instructor's (trainer) primary goal is to develop competency in the trainee's knowledge and driving skills to eventually safely operate a commercial vehicle solo. Driver instructors are responsible to evaluate, teach, coach, and document the trainee's performance throughout each phase of training.

Driver trainees are responsible to complete all training in accordance with this program. The length of training for this program is dependent upon the trainee's knowledge, skills, and aptitude to operate their commercial motor vehicle independently. Trainees have up to twelve weeks to competently demonstrate the knowledge and skills taught to them. If the trainee does not demonstrate competency within twelve weeks, the trainer and safety director will assess the trainee's progress to determine if more training is needed or to dismiss the trainee from the program.

INSTRUCTOR AND TRAINEE ACCOUNTABILITIES

During training the instructor and trainee are responsible to the following accountabilities and are subject to the company's disciplinary action policy.

- Team driving is strictly prohibited. Driver instructors are required to be in the front passenger seat when the trainee is driving the vehicle.
- Safe and legal operation of a commercial motor vehicle.
- Timely transportation of freight from its origin to destination.
- Proper loading and unloading of freight to assure safety and minimal risk of damage to cargo and danger to persons.
- Proper handling and accurate completion of all necessary paperwork related to the dispatched trip.
- Professional representation of the Company through responsible driving.
- Cooperation with managers, supervisors, and other corporate staff.

DEFINITIONS

Behind-the-wheel (BTW) range instructor mean a driver trainer that meets the eligibility requirements of this program and provides BTW range instruction to driver trainees.

Behind-the-wheel (BTW) range training means training provided by a qualified instructor when a driver trainee has actual control of the power unit during a driving lesson conducted on a range. BTW range training does not include time a driver trainee spends observing the operation of a CMV when he or she is not in control of the vehicle.

Behind-the-wheel (BTW) road instructor mean a driver trainer that meets the eligibility requirements of this program and provides BTW road instruction to driver trainees.

Behind-the-wheel (BTW) road training means training provided by a qualified instructor when a driver trainee has actual control of the power unit during a driving lesson conducted on a public road. BTW road training does not include the time that a driver trainee spends observing the operation of a CMV when he or she is not in control of the vehicle.

Demonstrates proficiency means successfully demonstrating the knowledge, skills, or aptitude to safely perform or complete a particular job task.

Driver trainee means an individual commercial motor vehicle driver who has been accepted as a trainee in the Company's CDL Finishing program.

DRIVER TRAINEE ELIGIBILITY REQUIREMENTS

With the exception of the following requirements the trainee must meet all other minimum driver applicant requirements:

- Trainee must be at least 25 years old
- Graduate of a PTDI accredited or college accredited truck driving school or equivalent
- Must possess a valid, commercial driver's license, with proper endorsements, that match the type of class of vehicle the trainee will be assigned
- Must possess a valid medical examiner's certificate not less than 1 year
- Must be able to pass a DOT pre-employment controlled substance test
- Must not have any of the following violations within the past 3 years
 - DUI or DWI
 - Possession of alcohol or drugs in a commercial motor vehicle
 - Hit and run violations
 - Reckless, careless, or negligent driving
 - CMV used in a felony

DRIVER INSTRUCTOR ELIGIBILITY REQUIREMENTS

The following eligibility requirements must be met to become a driver instructor. If at any time an instructor does not meet the applicable requirements, they will be removed from being an instructor. Reinstatement as an instructor will be up to the sole discretion of the Company's management.

Behind-the-wheel (BTW) range instructor must meet the following qualifications:

- A BTW range instructor, who provides training solely on a range, is not required to hold a CDL of the same (or higher) class and with all endorsements necessary to operate the CMV for which training is to be provided, as long as the instructor previously held a CDL of the same (or higher) class and with all endorsements necessary to operate the CMV for which training is to be provided.
- An instructor is not eligible if their CDL (or prior CDL) has been cancelled, suspended, or revoked due to any state or federal disqualifying offenses.
- No preventable accidents in the past three years
- No moving violation convictions in the past two years
- Must not have any of the following violations within the past 5 years
 - DUI or DWI
 - Possession of alcohol or drugs in a motor vehicle
 - Hit and run violations
 - Reckless, careless, or negligent driving
 - Speeding over 15 mph
 - CMV used in a felony
- Must not be under any company disciplinary action
- Must be able to provide clear communication to driver trainee.
- Must have two-year' experience with company and be familiar with the company's operations.
- Must complete the company's "Instructor Train-the-Trainer Course"

Behind-the-wheel (BTW) road instructor must meet the following qualifications:

- Holds a CDL of the same (or higher) class and with all endorsements necessary to operate the CMV for which training is to be provided and has at least 2 years of experience driving a CMV requiring a CDL of the same or higher class and/or the same endorsement.
- An instructor is not eligible if their CDL has been cancelled, suspended, or revoked due to any state or federal disqualifying offenses.
- No preventable accidents in the past three years
- No moving violation convictions in the past two years
- Must not have any of the following violations within the past 5 years
 - DUI or DWI
 - Possession of alcohol or drugs in a motor vehicle
 - Hit and run violations
 - Reckless, careless, or negligent driving
 - Speeding over 15 mph
 - CMV used in a felony
- Must not be under any company disciplinary action
- Must be able to provide clear communication to driver trainee.
- Must have one-year experience with company and be familiar with the company's operations.
- Must complete the company's "Instructor Train-the-Trainer Course"

DRIVER INSTRUCTOR TRAINING

All driver instructors must meet eligibility requirements to become and remain an instructor. To provide consistent quality training to trainees, all driver instructors must complete all courses listed on the "Driver Instructor Training" form. The safety director will document completion of all required training.

CDL FINISHING COURSE

Once the trainee has completed the company's new hire classroom orientation program, they will be entered into the CDL Finishing Program. There are six phases of this program, which are listed below, and completion depends on the trainee completing and demonstrating proficiency in all areas.

- Program Orientation
- Initial Road Test
- Individual Training Plan
- Behind-the-Wheel Range Training
- Behind-the-Wheel Road Training
- Final Road Test
- Completion of the "Trainee Evaluation of CDL Finishing Program" form
- Completion of a 6-month probationary period

Program Orientation

On the first day of training the safety director and driver instructor will meet with the trainee to review the CDL Finishing Program and their Individual Training Plan. The safety director will explain the program's goal and objectives, trainee accountabilities, definitions, driver trainee eligibility requirements, and the six phases of the training course. Once the Program Orientation has been completed the trainee will begin BTW range training.

BTW Range Training

This is the second phase of this course; it must be completed before the driver can begin BTW Road training. To complete this training phase, driver instructors and trainees will use the "Behind-the-Wheel Range Training" guide and the "Behind-the-Wheel Range Assessment" form. In the "Behind-the-Wheel Range Training" guide, listed in the left-hand column, are eleven assessment and training categories. Trainees must demonstrate knowledge, skills and aptitude on the specific requirements listed in the right-hand column. To complete this phase of training the trainee must successfully demonstrate these skills multiple times to show they are proficient to safely perform these tasks. The instructor will ask the trainee to perform these skills multiple times to see which skills they perform proficiently, and which skills need improvement. Once an assessment is over the trainer will share results with the trainee. The instructor will provide time to practice skills that need improvement. It is the responsibility of the trainee to put in the training time needed to pass this phase of training. Once the trainee feels comfortable with the development of skills they will be re-assessed by the instructor. The instructor will document performance for each day of assessment on the "BTW Range Assessment" form. Once the trainee has demonstrated proficiency in all range skills, they will immediately begin BTW road training. After completion of the training, the instructor must submit all assessments to the safety director.

If skills are not developed in three days, the instructor will discuss progress with the safety director. The safety director will decide to continue training or release the trainee from the program and terminate employment.

At any time, the trainee demonstrates unsafe behavior the instructor will cease all training and immediately report behavior to the safety director. The unsafe act will be reviewed and either a plan of action will be developed, or the trainee will be released from the training program and employment will be terminated.

BTW Road Training

The third phase of training is BTW road training. To complete this training phase, trainers and trainees will use the “Behind-the-Wheel Road Training” guide, “Behind-the-Wheel Road Daily Assessment” form, and “Behind-the-Wheel Weekly Assessment form. In the “Behind-the-Wheel Road Training” guide, listed in the left-hand column, are nineteen assessment and training categories. Trainees must demonstrate knowledge, skills and aptitude on the specific requirements listed in the right-hand column. To complete this phase of training the trainee must successfully demonstrate these skills multiple times to show they are proficient to safely operate the commercial motor vehicle and its related job tasks. The driver instructor will assess performance of each skill and will provide feedback and training throughout each trip. For the first three weeks the instructor will document each day’s performance on a separate “BTW Road Daily Assessment” form. After the first three weeks of documenting daily assessments the instructor, upon their discretion and the trainee’s progress, can use the “BTW Weekly Assessment” form and can continue using it throughout the remainder of the training. The driver instructor is responsible to provide all daily and weekly training assessments to the safety director.

If at any point the instructor feels the trainee is not progressing in development of skills the instructor will discuss the trainee’s performance with the safety director. Likewise, if proficiency is not demonstrated within the agreed upon training time frame the instructor will discuss progress with the safety director. The safety director, at their sole discretion, will decide to continue training or release the trainee from the program and terminate employment.

At any time, the trainee demonstrates unsafe behavior the instructor will cease all training and provide guidance to the trainee. If the guidance is ignored or the unsafe behavior is repeated the instructor will again stop training and immediately report the unsafe act to the safety director. The unsafe act will be reviewed and either a plan of action will be developed, or the trainee will be released from the training program and employment will be terminated.

Final Road Test

After completion of the BTW Road Training, as a quality control measure, a final road test will be given to the trainee by a driver instructor who did not provide training to the trainee. The road test must be documented on the “Final Road Test & Certification” form. The completed form must be submitted to the safety director. The safety director will consult with the road test examiner, the trainee’s instructor(s) and review all documentation to determine successful completion of the program. Once the safety director is satisfied with the trainee’s performance the trainee will be released to operate solo.

Evaluation of CDL Finishing Program

At the completion of all phases of the training program the trainee must complete the “Trainee Evaluation of CDL Finishing Program” form and submit it to the safety director. Once this has been completed, and the trainee has been released to drive solo, the safety director will complete the certificate of training and present it to the trainee.

TRAINING EQUIPMENT

- All vehicles used in the behind-the-wheel training must comply with applicable Federal and State safety requirements.
- Vehicles used to train must be in the same group and type that trainee will operate once released to drive solo.
- All securement devices/equipment used to load, unload, secure or protect cargo must be the same type the trainee will use once released to operate solo.

DOCUMENTATION

This program contains the following forms:

- Driver Instructor Training
- Individual Training Plan
- BTW Range Training Guide
- Range Course Set Up and Instructions
- BTW Range Assessment Form
- BTW Road Training Guide
- BTW Road Daily Assessment Form
- BTW Road Weekly Assessment Form
- Final Road Test & Certification
- Trainee Evaluation of CDL Finishing Program
- Certificate of Completion

PERFORMANCE MONITORING

In accordance with company policy the trainee will remain in a trainee status for six months from the date of completion of this program. During this time period the trainee's performance will be closely monitored. Monitoring will include safety performance data such as hard braking, quick accelerations, speeding and other available data to include input from the trainee's supervisor. All unsafe performance indicators will be reviewed and depending upon the severity and frequency of the events, the trainee and/or trainer may be subject to disciplinary action up to and including termination of employment. Trainee will complete 30-, 60-, and 90-day evaluations by the Safety Coordinator.

PROGRAM DOCUMENTS

INDIVIDUAL TRAINING PLAN

Trainee's Name: _____

Instructor's Name: _____

Training program start date: _____

Required Training as determined by Safety Director (select one of the following)

☐ Trainee has less than 6 months of verifiable CMV experience in the type of equipment they will operate for our company; trainee is placed into 4 to 8 weeks (minimum) of required training; trainee must complete training program to drive solo. During the first week of road training the driver trainee will not drive more than 6 hours each day. During the second week of road training the driver trainee will not drive more than 8 hours each day.

☐ Trainee has 6 months or more of verifiable CMV experience in the type of equipment they will operate for our company; trainee is placed into 2 to 4 weeks (minimum) of required training; trainee must complete training program to drive solo. During the first week of road training the driver trainee will not drive more than 8 hours each day.

☐ Trainee has at least 1 year but less than two years of verifiable CMV experience in the type of equipment they will operate for our company; trainee is placed into 1 to 2 weeks (minimum) of required training; trainee must complete training program to driver solo.

Program Completion Requirements

The trainee must complete and demonstrate proficiency in the training phases listed below:

- Program Orientation
- Initial Road Test
- Behind-the-Wheel Range Performance Training
- Behind-the-Wheel Road Performance Training
- Final Road Test
- Completion of the "Trainee Evaluation of CDL Finishing Program" form
- 30-60-90 Day Evaluations
- Completion of a 6- month probationary period

I acknowledge that I have received a copy of this plan, CDL Finishing Program guide, BTW Range Guidelines and assessment form, BTW Road Guidelines and assessment form.

I agree to the terms contained herein and the requirements required to complete the Company's CDL Finishing Program.

Signed and dated this _____ day of _____, 20____.

Trainee's Signature

Trainee's Printed Name

Company Representative Signature

Printed Name and Title

BEHIND-THE-WHEEL RANGE TRAINING

Performance Guidelines, Assessments & Training

Below, listed in the left-hand column, are eleven assessment and training categories. Trainees must demonstrate knowledge, skills and aptitude on the specific requirements listed in the right-hand column. To complete this portion of assessments and training the trainee must successfully demonstrate these skills multiple times to show they are proficient to safely perform these tasks. The instructor will ask the trainee to perform these skills multiple times to see which skills they perform proficiently, and which skills need improvement. Once an assessment is over the instructor will share results with the trainee. The instructor will provide time to practice skills that need improvement. It is the responsibility of the trainee to put in the training time needed to pass this phase of training. Once the trainee feels comfortable with the development of skills they will be re-assessed by the instructor. The instructor will document performance for each day of assessment on the "BTW Range Assessment" form. Once the trainee has demonstrated proficiency in all range skills, they will immediately begin BTW road training. After completion of the training, the instructor must submit all assessments to the safety director.

Use the BTW Range Assessment Course Set Up and Instructions Guide for setting up the BTW range course. Using the same set up and instructions for each trainee will help ensure consistency in the range assessment and training phase.

At any time, the trainee demonstrates unsafe behavior the instructor will cease all training and provide guidance to the trainee. If the guidance is ignored or the unsafe behavior is repeated the instructor will again stop training and immediately report the unsafe act to the safety director. The unsafe act will be reviewed and either a plan of action will be developed, or the trainee will be released from the training program and employment will be terminated.

Assessment, practicing of skills and re-assessment will continue for up to three days. If skills are not developed within this time period, the instructor will discuss progress with the safety director. The safety director will decide to continue training or discontinue training and terminate employment.

Behind-the-Wheel Range Performance Guidelines

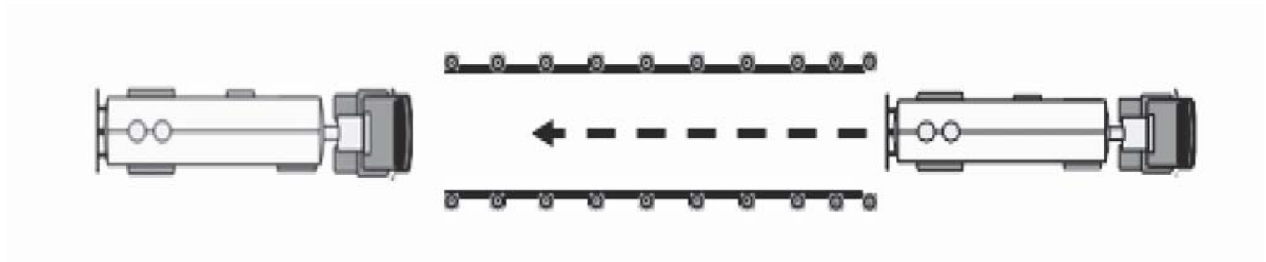
Basic Operation	Explains and demonstrates the instrument panel and controls of the CMV
Vehicle Inspection	Demonstrates proficiency in inspecting the mechanical systems, parts and accessories necessary for the safe operation of the CMV
Emergency/Safety Equipment	- Identifies the fire extinguisher and demonstrates how to use it - Identifies emergency triangles and shows to properly place them if traveling on different types of roads - Correctly adjusts seat and properly wears seat belt
Straight Line Backing	Driver-trainees must demonstrate proficiency in proper techniques for performing straight line backing maneuvers
Alley Dock Backing	Driver-trainees must demonstrate proficiency in proper techniques for performing 45/90-degree alley dock maneuvers

Off-Set Backing	• Driver-trainees must demonstrate proficiency in proper techniques for performing off-set right and left backing maneuvers
Parallel Parking Blind Side	• Driver-trainees must demonstrate proficiency in proper techniques for performing parallel parking blind side positions/maneuvers
Parallel Parking Sight Side	• Driver-trainees must demonstrate proficiency in proper techniques for performing sight side parallel parking maneuvers
Coupling and Uncoupling	• Driver-trainees must demonstrate proficiency in proper techniques for coupling, inspecting, and uncoupling combination vehicle units, as applicable
Cargo Securement	• Demonstrates proper inspection, use and storage of securement devices • Demonstrates proper cargo securement
Loading and Unloading	• Explains company policy on loading and unloading procedures • Explains cargo weight distribution and how the cargo will affect the vehicle's stability and driving dynamics

Range Course Set Up and Instructions

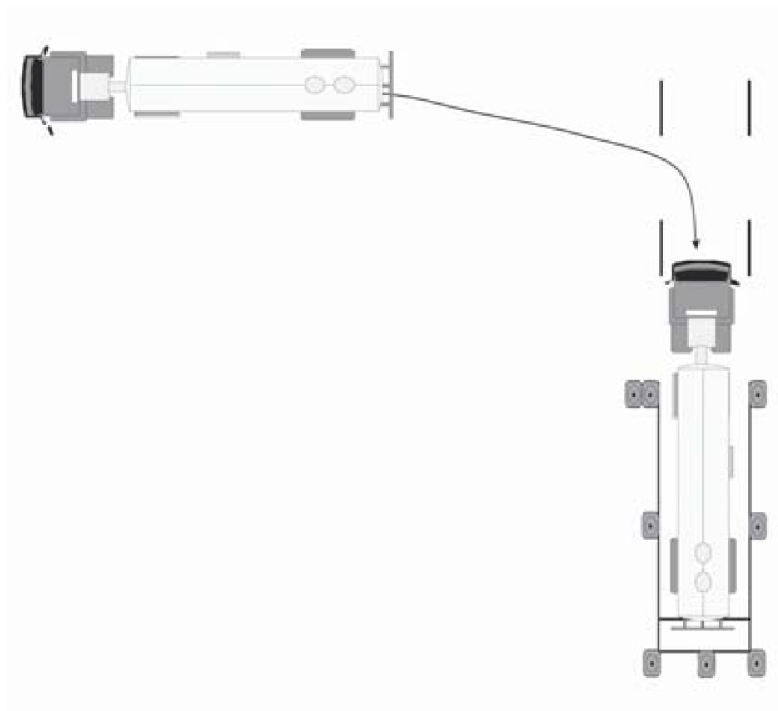
Straight Line Backing

- Back your vehicle in a straight line between two rows of cones without touching or crossing over the exercise boundaries. See Diagram below.



Alley Dock Backing

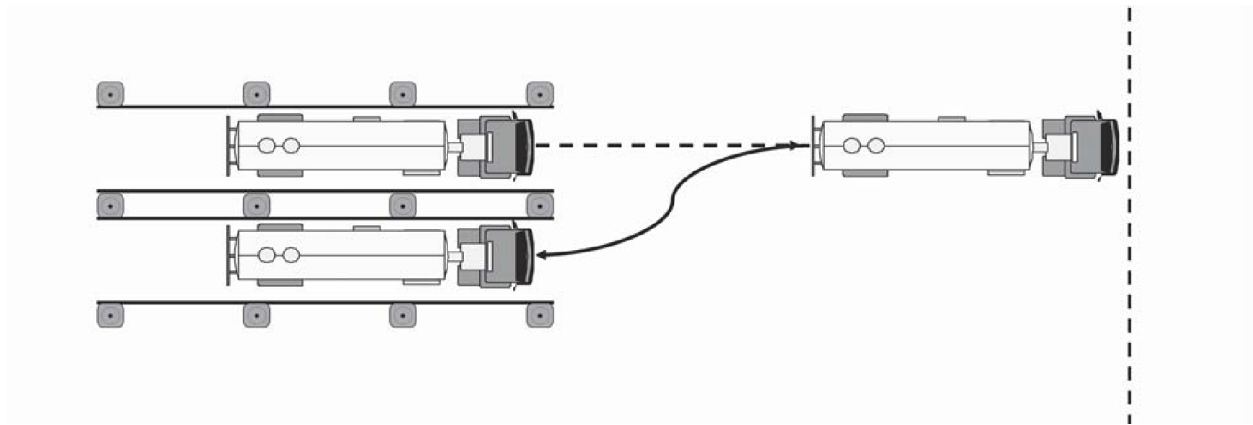
- Sight-side back your vehicle into an alley. You will drive past the alley and position your vehicle parallel to the outer boundary. From that position, back into the alley bringing the rear of your vehicle within 3 feet of the rear of the alley without touching boundary lines or cones. Your vehicle must be straight within the alley/lane when you have completed the maneuver. See Diagram below.



Source: Illinois CDL Commercial Driver's License Study Guide, www.cyberdriveillinois.com, Printed by authority of the State of Illinois. September 2017

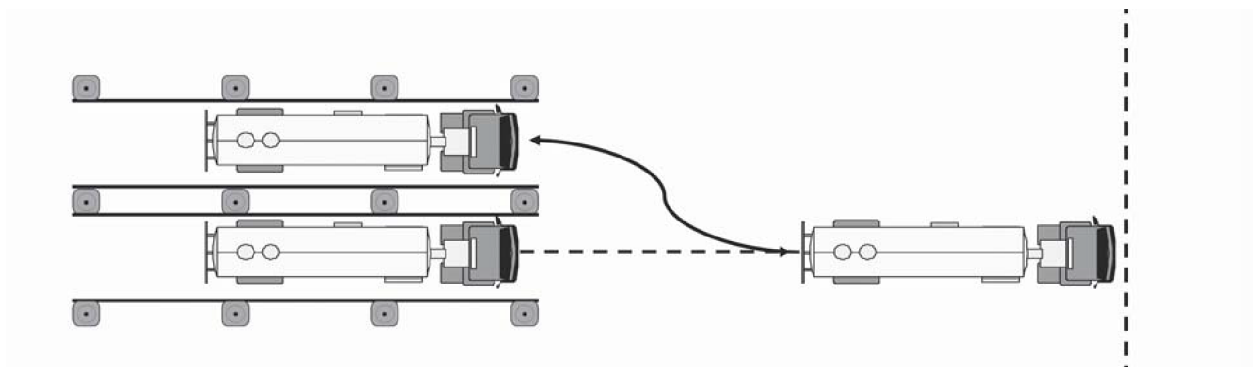
Off-Set Backing (Right)

- Back into a space that is to the right rear of your vehicle. You will drive straight forward and back your vehicle into that space without striking the side or rear boundaries marked by cones. You must place your vehicle completely into the space. See Diagram below.



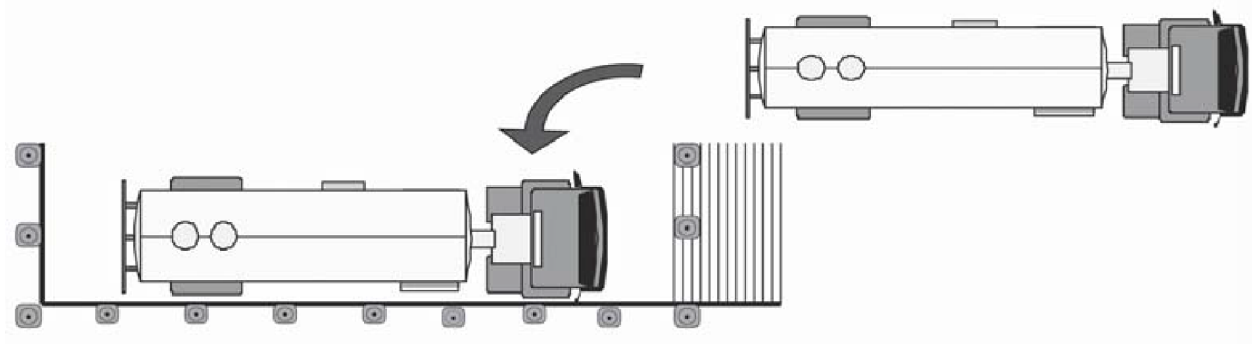
Off-Set Backing (Left)

- Back into a space that is to the left rear of your vehicle. You will drive straight forward and back your vehicle into that space without striking the side or rear boundaries marked by cones. You must place your vehicle completely into the space. See Diagram below.



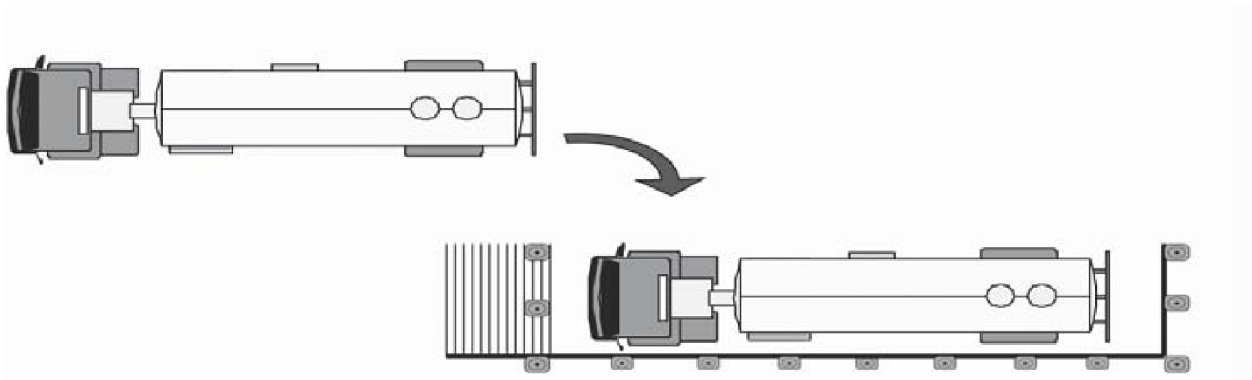
Parallel Parking (Blind Side)

- You may be asked to park in a parallel parking space that is on your right. You are to drive past the parking space and back into it bringing the rear of your vehicle as close as possible to the rear of the space without crossing side or rear boundaries marked by cones. You are required to get your vehicle completely into the space. See Diagram below.



Parallel Parking (Sight Side)

- Park in a parallel parking space that is on your left. You are to drive past the parking space and back into it bringing the rear of your vehicle as close as possible to the rear of the space without crossing side or rear boundaries marked by cones. You are required to get your vehicle completely into the space. See Diagram below.



BEHIND-THE-WHEEL RANGE ASSESSMENT FORM

Trainee's Name: _____

Instructor's Name: _____

Date of Assessment: _____

*In the "Attempts" column mark "P" for pass or "NI" for needs improvement.

**In the "Demonstrates Proficiency" column mark "Yes" or "No" if the trainee does or does not demonstrate repeated proficiency

Task	P or NI	P or NI	P or NI	P or NI	P or NI	Demonstrates Proficiency Yes or No
Basic Operation						
Vehicle Inspection						
Straight Line Backing						
Alley Dock Backing						
Off-Set Backing						
Parallel Parking Blind Side						
Parallel Parking Sight Side						
Coupling & Uncoupling						
Cargo Securement						
Loading & Unloading						

☐ The above-named trainee successfully completed BTW Range Training.

☐ The above-named trainee has not successfully completed BTW Range Training. Additional training is recommended.

Signature of Instructor: _____

Date: _____

Signature of Trainee: _____

Date: _____

BEHIND-THE-WHEEL ROAD TRAINING

Performance Guidelines, Assessments & Training

Below, listed in the left-hand column, are nineteen assessment and training categories. Trainees must demonstrate knowledge, skills and aptitude on the specific requirements listed in the right-hand column. To complete this portion of assessments and training the trainee must successfully demonstrate these skills multiple times to show they are proficient to safely operate the commercial motor vehicle and its related job tasks. Instructor will assess performance of each skill and will provide feedback and training throughout each trip. For the first three weeks the instructor will document each day's performance on a separate "BTW Road Daily Assessment" form. After the first three weeks of documenting daily assessments the instructor, upon their discretion and the trainee's progress, can use the "BTW Weekly Assessment" form and can continue using it throughout the remainder of the training.

At any time, the trainee demonstrates unsafe behavior the instructor will cease all training and provide guidance to the trainee. If the guidance is ignored or the unsafe behavior is repeated the instructor will again stop training and immediately report the unsafe act to the safety director. The unsafe act will be reviewed and either a plan of action will be developed, or the trainee will be released from the training program and employment will be terminated.

Daily assessment of skills will continue throughout the training designated time period. If proficiency of skills are not developed within this time period, the instructor will discuss progress with the safety director. The safety director will decide to continue training or discontinue training and terminate employment.

Behind-the-Wheel Road Performance Guidelines

Trip Planning & Preparation	• Properly accepts trip from dispatch • Properly plans for driving time and rest breaks • Verifies accident kit is in the truck • Reviews permit book for all required documents • Verifies there are at least 8 days of log sheets in the vehicle • Has company fuel card • Properly logs into ELD system • Properly adjusts seat • Properly adjusts mirrors
Pre- & Post-Trip Vehicle Inspections	• Completes pre and post trip inspections on the vehicle's components, parts, and accessories necessary for safe operation • Inspects cargo securement devices • Inspects cargo securement
Enroute vehicle & cargo inspections	• Trainee routinely complete enroute vehicle and cargo securement inspections during each trip

	Identifies issues and takes appropriate corrective action
Driver Vehicle Inspection Report (DVIR)	- Prepares a report at the completion of each day's work, when vehicle defects or deficiencies are discovered or reported to them, and promptly notifies the company for repairs - Trainee understands it is against company policy to operate an unsafe vehicle
Vehicle Control	- Left Turns – Signals intention before making turn, positions vehicle for turn and controls vehicle tracking in turn - Right Turns – Signals intention before making turn, positions vehicle for turn and protects right side of vehicle and lane; controls vehicle tracking in turn - Lane Changes – Signals intention before lane change, checks mirrors, maintains a safe following distance before, during and after lane change and makes gradual smooth lane change - Safely negotiates curves at highway speeds – identifies hazard, adjusts speed as necessary and stays in travel lane - Entry and Exit on the Interstate or controlled access Highway – Signals intention early, checks mirrors, adjusts speed for flow of traffic or exiting and merges or exits without creating danger or hazard to other drivers
Communications	- Signaling – Demonstrates proficiency in proper techniques for signaling intentions and effectively communicating with other drivers - Uses horn when appropriate
Defensive Driving	- See Hazards – Demonstrates proper techniques for visually searching the road and surrounding area for potential hazards and critical objects - Maintains required following distance - Keeps a 12 to 15 second eye lead time - Scans mirrors every 5 to 8 seconds - Changes eye focus every 3 to 5 seconds - Avoids fixed stares - Anticipate Actions – Constantly mindful of speed and space management and demonstrates space awareness - Scans intersections before entering them - Increases following distance during extreme weather conditions, night driving and after seeing potential hazards - Anticipates dangers of others - Finds Space – Demonstrates the ability to find space around their vehicle to react properly to changing situations - Properly communicates - Increases space around vehicle to increase decision and reaction time

	○ Reduces or adjusts speed when necessary ○ Makes lane changes when necessary • Reacts – Properly reacts to potential hazards and dangers ○ Keeps vehicle under control ○ Does not make risky driving decisions
Hours of Service/ Electronic logging device (ELD)	• 11 hours of driving – Demonstrates management of driving time • 10 hours of consecutive rest – Demonstrates management of proper rest to reduce fatigue • 30-minute rest brake – Demonstrates management of rest brakes • 14 hours on-duty – Demonstrates management of on-duty time • 70 hours on-duty in 8 consecutive days – Demonstrates management of driving/on-duty time • ELD Use – Demonstrates proper use of electronic logging device to include edits and appropriate annotations when required • ELD Malfunction – Keeps instruction sheet in the vehicle and can properly describe ELD malfunction reporting requirements and record keeping procedures • ELD – Maintains at least 8 days of log sheets in vehicle • ELD Roadside – Maintains instruction sheet provided by the company for describing the data transfer mechanisms supported by the ELD and step-by-step instructions for the driver to produce and transfer the driver's hours-of-service records to an authorized safety official
Railroad Crossing	• Driver-trainees must demonstrate the ability to recognize potential dangers and to demonstrate appropriate safety procedures before and during RR-highway grade crossings
Night Operation	• Explained factors affecting the safe operation of CMVs at night and in darkness. • Demonstrated the safe operation of a CMV during changes in vision. • Properly adjusted speed and space, and proper use of lights.
Extreme Driving Conditions	• Demonstrates or explains safe operation of the CMV in cold, hot, and inclement weather and on steep grades and sharp curves. • When applicable, trainee demonstrated tire chaining procedures.
Backing and Docking	• Sets up vehicles properly to safely back. Avoids blind side backing whenever possible • Uses the GOAL (get out and look) method • Controls speed vehicle speed when backing • Demonstrates safe backing and docking of vehicles.

	• Properly communicates and uses ground guide when available
Skid Control/Recovery, Jackknifing, and Other Emergencies	• Avoids skidding and jackknifing • Explains how to maintain directional control and bring the CMV to a stop in the shortest possible distance while operating over a slippery surface. • Explains evasive steering, emergency braking, and off-road recovery • Explains proper response to brake failures, tire blowouts, hydroplaning, and potential rollovers
Roadside Inspections	• Appropriately interacts with scale enforcement, state officials and/or law enforcement during inspections • Provides all proper paperwork to inspector • Reports all inspection violations to supervisor immediately following inspection • Corrects all OOS deficiencies before operating vehicle • Provides inspection paperwork in accordance with company policy
Vehicle Maintenance	• Explains the company's vehicle maintenance program
Accidents and Roadside Breakdowns	• Explains the company's driver's accident handling procedures • Explains the company's vehicle breakdown procedures • Explains and/or demonstrates how to use emergency warning devices
Loading & Unloading	• Demonstrates proper loading procedures • Understands company policy on handling shipper and receiver paperwork • Correctly documents shipping paperwork when counting of cargo and cargo securement cannot be completed due to shipper loading • Verifies seal number to bill of lading • Obeyes all shipper and receiver safety guidelines • Understands company policy on unhooking from a loaded trailer
Personal Safety & Security	• Properly positions body to light hood • Properly positions body when using trailer landing gear • Properly positions body when disengaging 5th wheel • Used proper body positioning to lift objects • Uses 3 points of contact to climb up or down

	• Locks doors and keeps windows rolled up when not traveling on highways or when leaving vehicle • Keeps an awareness of surroundings at truck stops, rest areas and other stop locations • Parks in well lighted areas
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BEHIND-THE-WHEEL ROAD DAILY ASSESSMENT FORM

Trainee's Name: _____ Date: _____

Instructor's Name: _____

Date of Training: _____

Roads traveled: _____ Rural: _____ Urban: _____ Suburban: _____ City: _____

Vehicle Numbers: _____

Routes Completed: _____

Weather Conditions: _____

GENERAL SKILLS	Demonstrates Proficiency (Place an X into one of the boxes each time the driver demonstrates proficiency)						Needs Improvement
Trip planning & preparation							
Pre-trip inspection							
Cargo securement & weight distribution							
Paperwork procedures							
En-route inspections							
Post-trip inspection							
DVIR							
Manages distractions							
Public interaction (follows safety rules, attitude)							
Hours of Service (ELD)							
Driving Skills							
Identifies & anticipates driving hazards							
Safely enters intersections							
Safe following distance							
R/R grade crossing							
Follows speed limits							
Obeys all traffic devices & signs							
Proper use of mirrors							
Communication – properly uses signals and horn							
Safe lane changes							
Stopping and starting							
Turning maneuvers (Left and Right)							
Merging							
Lane control							
Backing and docking							
Adjusts to changing road conditions							
Speed control							
Communication							
Personal Safety & Security							
Uses injury prevention techniques							
Keeps a constant surveillance of personal surroundings							
Keeps truck, trailer and cargo secure							

Signature of Instructor: _____ Date: _____

Signature of Trainee: _____ Date: _____

BEHIND-THE-WHEEL ROAD WEEKLY ASSESSMENT FORM

Trainee's Name: _____ Date: _____

Instructor's Name: _____

Date of Training: _____

Roads traveled: _____ Rural: _____ Urban: _____ Suburban: _____ City: _____

Vehicle Numbers: _____

Routes Completed: _____

Weather Conditions: _____

GENERAL SKILLS	Demonstrates Proficiency (Place an X into one of the boxes each time the driver demonstrates proficiency)						Needs Improvement
Trip planning & preparation							
Pre-trip inspection							
Cargo securement & weight distribution							
Paperwork procedures							
En-route inspections							
Post-trip inspection							
DVIR							
Manages distractions							
Public interaction (follows safety rules, attitude)							
Hours of Service (ELD)							
Driving Skills							
Identifies & anticipates driving hazards							
Safely enters intersections							
Safe following distance							
R/R grade crossing							
Follows speed limits							
Obeys all traffic devices & signs							
Proper use of mirrors							
Communication – properly uses signals and horn							
Safe lane changes							
Stopping and starting							
Turning maneuvers (Left and Right)							
Merging							
Lane control							
Backing and docking							
Adjusts to changing road conditions							
Speed control							
Communication							
Personal Safety & Security							
Uses injury prevention techniques							
Keeps a constant surveillance of personal surroundings							
Keeps truck, trailer and cargo secure							

Signature of Instructor: _____ Date: _____

Signature of Trainee: _____ Date: _____

CDL Finishing Program

FINAL ROAD TEST & CERTIFICATION

Trainee's Name: _____

Examiner's Name: _____

Power Unit (Company #): _____ Trailer (Company #): _____

Observed Skills (✓)

- ☐ Pre-trip inspection
- ☐ Coupling and uncoupling of combination units
- ☐ Placing commercial motor vehicle in operation
- ☐ Use of vehicle's controls and emergency equipment
- ☐ Operating the commercial motor vehicle in traffic
- ☐ Communication
- ☐ Lane Changes
- ☐ Entering & exiting highways, merging
- ☐ Crossing intersections
- ☐ Lane control
- ☐ Left and right hand turns
- ☐ Railroad track crossing
- ☐ Braking, and slowing the commercial motor vehicle by any means other than braking
- ☐ Backing, and parking the commercial motor vehicle
- ☐ Stopping
- ☐ Uses defensive driving skills

This is to certify that the above named driver was given a road test under my supervision on

_____, 20____ consisting of approximately _____ miles of driving.

It is my considered opinion that this driver possesses sufficient driving skill to operate safely the type of commercial motor vehicle listed above.

Signature of Examiner: _____ Title: _____

TRAINEE EVALUATION OF CDL FINISHING PROGRAM

Trainee: _____

Date: _____

Trainer: _____

Directions:

Please read each question carefully and circle Yes or No that best describes your trainer's performance in that area.

Did your trainer clearly present topics in a way that you could understand?	Yes	No
Did your trainer verify your understanding of the information presented?	Yes	No
Did you feel comfortable asking your trainer questions?	Yes	No
Was your trainer patient and understanding when you asked questions?	Yes	No
Did your trainer show interest in training you?	Yes	No
Did your trainer treat you in a fair and professional manner?	Yes	No

Directions:

Please answer the following questions to help us improve our training program.

1. Were there any areas of your training you feel need to be improved?
2. Where there any areas of your training you feel were exceptionally helpful?
3. Are there any areas where you feel you need additional training?
4. Do you have any additional comments?

Certificate of Completion



This is to certify that

Add Trainee's Name Here

Has successfully completed the Company's

CDL Finishing Program

Certified By: _____

Date: _____

CERTIFICATE OF COMPLETION



New Belt Driver Training Checklist

New Driver Name: _____ Date of Training: _____

Lead Driver (Trainer) Name: _____

For New Driver Training the goals are to complete New Driver training/orientation and pass the company "Road Test" with Safety Manager, get with Lead Driver (Trainer) and observe, perform, operate, ask questions, and show proficiency of the below tasks:

New Driver Lead Driver

- | | | |
|-------|-------|---|
| _____ | _____ | Observe, perform, and ask questions on all aspects of Pre and Post Trip, explain DVIR (Driver Vehicle Inspection Report) on the driver's tablet and how to submit the DVIR for both pre and post trip inspections. |
| _____ | _____ | Observe, perform, and ask questions of plant protocol and load out procedures (Specifically: tarping and untarping, how to load evenly and distribute weight in trailer to avoid an over axle ticket, also alternate route options, and mud routes at customer locations. |
| _____ | _____ | Observe and ask questions of safety expectations and company policies on defensive driving of truck. |
| _____ | _____ | Observe, operate, and ask questions of trailer operation (PTO, electric or manual tarp, doors, gates, sensors, etc.) |
| _____ | _____ | Observe, perform, and ask questions about procedure/ protocol when delivering a load to a customer location. <ul style="list-style-type: none">• Weight discrepancies-call dispatch any time you have a weight discrepancy• Make sure product is being delivered to the correct customer location as well as the correct bin or drop location |
| _____ | _____ | Observe, perform, and ask questions on daily paperwork procedure/protocol (Drop Boxes, BOL's, scale tickets) |
| _____ | _____ | Observe, operate, and ask questions about TruckSpy functions on the driver's tablet: <ul style="list-style-type: none">• Inspections (DVIR for daily pre & post trip inspections)• Messages (To communicate with dispatch for load numbers, wait times, etc.)• Trip (Load Information)• Navigation (GPS for all pick up and drop off locations on approved routes)• Coaching (Coaching information sent for review and acknowledgement by the Safety Manager) |
| _____ | _____ | Observe, perform, and ask questions about equipment cleanliness, upkeep, and expectations as well as procedure/protocol on customer location front end loaders , fueling the truck, and recording mileage. |
| _____ | _____ | Observe, perform, and ask questions of dispatch procedure/protocol for: <ul style="list-style-type: none">• How to navigate the TruckSpy homepage to see daily dispatch• How to send loaded and unloaded weights to dispatch through TruckSpy• How to use the fuel card at the fuel island at the Panhandle Express truck yard.• Where the fuel card can be used at if unable to be brought through Hereford. |
| _____ | _____ | Observe, document, and ask questions of all ELD and Ag-Exempt regulations. <ul style="list-style-type: none">• Know if they are supposed to be on an ELD or qualify as Ag-Exempt• How to change between ELD and Ag-Exempt in TruckSpy |
| _____ | _____ | Driver knows the expectations on compliance with Hours of Service on all loads. |
| _____ | _____ | Driver will be required to have a fully charged one touch Bluetooth device and cell phone at the beginning of each workday per Panhandle Express, LLC policy and Federal Motor Carriers Safety Administration regulations. |

DRIVER IS NOT ALLOWED TO USE A HAND-HELD PHONE WHILE EQUIPMENT IS IN MOTION

*By both the new driver and the lead driver initialing EACH task above and both signing below both the New Driver, Lead Driver, and Safety Manager agree the above tasks have been explained and performed to a proficient and acceptable level and all agree the New Driver is cleared for equipment and dispatch loads. In order for both drivers to be paid, the Safety Manager must sign off on this sheet of paper, please get with him before turning this document in to paperwork box.

New Driver Signature: _____ Date: _____

Lead Driver Signature: _____ Date: _____

Operations Manager:_____ **# of Days Driver Trained:**_____

Safety Coordinator Signature:_____ **Date:**_____



New Walking Floor Driver Training Checklist

New Driver Name: _____

Start Date of Training: _____

Lead Driver (Trainer) Name: _____

For New Driver Training the goals are to complete New Driver training/orientation with Safety Coordinator, complete and pass company "Road Test", get with Lead Driver (Trainer) and observe, perform, operate, ask questions, and show proficiency of the below tasks:

- _____ Observe, perform, and ask questions on all aspects of Pre and Post Trip, explain DVIR (Driver Vehicle Inspection Report) on the driver's tablet and how to submit the DVIR for both pre and post trip inspections.
- _____ Observe, perform, and ask questions on all aspects of post trip and pre-trip, explain DVIR (Driver Vehicle Inspection Report) Booklet and daily procedure for accurately filling them out and turning them in with daily paperwork)
- _____ Observe, perform, and ask questions of plant protocol and load out procedures (Specifically: tarping and untarping, how to load evenly and distribute weight in trailer to avoid an over axle ticket, also alternate route options, and mud routes at customer locations.
- _____ Observe and ask questions of safety expectations and company policy on defensive driving of truck and of new driver
- _____ Observe, operate, and ask questions of trailer operation (PTO, tarp, doors, gates, etc.)
- _____ Observe, perform, and ask questions about procedure and protocol when delivering a load to a customer location (weight discrepancies-call dispatch any time you have a weight discrepancy, make sure product is being delivered to the correct customer location, and at the customer location the correct bin or drop location)
- _____ Observe, perform, and ask questions on daily paperwork procedure and protocol (Drop Boxes, BOL's, scale tickets, logs, DVIR's,)
- _____ Observe, perform, and ask questions on proper 3-point contact when climbing in, out or on equipment
- _____ Observe, operate, and ask questions on GPS use, procedure, and protocol as well as AMBEST fuel card procedures at yard/truck stop
- _____ Observe, perform, and ask questions about trailer cleanliness and upkeep as well procedure and protocol on sweeping and tarping trailer
- _____ Observe, perform and ask questions of dispatch procedure and protocol (what information to send in on GPS for each load, how to pick up and drop off loads on Truck Spy as well as the requirement to have their cell phone charged and with them each work-day)
- _____ Observe, document, and ask questions of all Hours-of-Service daily paperwork and adherence to DOT, Federal, State, and Local laws as well as company policy and procedures. New drivers should be able to differentiate between paper logs, Ag Exemption, and Short Haul Exemption.

Comments: _____

*By both the new driver and the lead driver initialing EACH task above and both signing below both the New Driver and the Lead Driver agree the above tasks have been explained and performed to a Proficient and acceptable level and both agree the New Driver is cleared for equipment and dispatch loads. In order for both drivers to be paid, the Safety Coordinator must sign off on this sheet of paper, please get with him before turning this document in to paperwork box.

New Driver Signature: _____ **Date:** _____

Lead Driver Signature: _____ **Date:** _____

Operation Manager: _____ **# of Days Driver Trained:** _____

Safety Coordinator Signature: _____ **Date:** _____



End Dump Driver Training Checklist

End Dump Driver Name: _____

Start date of Training: _____

Lead Driver Name: _____

***For End Dump Driver Training, the goals are to get with the Lead Driver and observe, perform, operate, ask questions, and show proficiency on the training tasks below:

- _____ Observe, perform, and ask questions on all aspects of Pre and Post Trip, explain DVIR (Driver Vehicle Inspection Report) on the driver's tablet and how to submit the DVIR for both pre and post trip inspections.
- _____ Observe, perform, and ask questions of plant protocol and load out procedures. Drivers need to check in at location before loading or unloading. Drivers are to stay in the truck the entire time the trailer is being unloaded.
- _____ Observe, perform, and ask questions of safety expectations and company policy on End Dump protocol and procedure.
 - Park on level ground-Take steps to ensure the surface of the ground is **hard packed** and not soft which could lead to a tip over of the trailer.
 - Report Hazardous/Dangerous unloading locations/ground to the Safety Coordinator **before** unloading **806-626-5802**
 - Ensure that tires are properly inflated.
 - Release air from the trailer's suspension.
 - Windy conditions-Be especially careful in windy conditions and know which direction the wind is blowing to avoid a cross wind.
 - Buildup- Ensure that the nose of the end dump is clean at all times to avoid build up so product won't stick and cause instability.
- _____ Observe and perform "**Three Point Contact**" at all times when entering/exiting the truck.
- _____ Observe, perform, and ask questions about procedure and protocol when delivering a load to a customer location (making sure product is being delivered to the **correct** customer location.)
 - Unloading- If other trucks are unloading, you must wait.
 - We are **NOT** to unload an end dump trailer when other trucks are in the unloading area.
- _____ Observe, perform, operate, execute and ask questions of trailer operation.
 - Dual rear latch- Ensure dual rear latch is unlatched **before** unloading.
 - Unloading-When unloading, you must first **look up** to ensure there are **NO** overhead objects above any part of your tractor and trailer, especially power lines.
 - Tire pressure- Ensure the tire pressure is equal in all trailer tires to help ensure stability.
- _____ Observe, perform, and ask questions of dispatch procedure and protocol (what information to send in on GPS for each load)
- _____ Observe, perform, and ask questions on daily paperwork procedure and protocol (BOL's, scale tickets, logs, DVIR's, short haul time-cards, etc.)
- _____ Observe, perform, and ask questions of all Hours of Service daily paperwork and adherence to DOT, Federal, State, and Local Laws as well as company policy and procedures. Drivers should be able to differentiate between paper logs, Ag Exemption and Short Haul Exemption.

Comments _____ *

* By both the New End Dump Driver and Lead Driver initialing each task above and both signing below, both the New End Dump Driver and the Lead Driver agree that the above tasks have been explained and performed to an acceptable level and both agree the New End Dump Driver is cleared for equipment and dispatch loads. In order for both drivers to be paid, the Safety Coordinator must sign off on this sheet of paper, please get with him before turning this document into paperwork box.

New Driver Signature: _____ Date: _____

Lead Driver Signature: _____ Date: _____

Operations Manager: _____

Safety Coordinator: _____ Date: _____



New Liquid Driver Training Checklist

New Liquid Driver Name: _____

Date of Training: _____

Lead Driver (Trainer) Name: _____

For New Driver Training the goals are to get with Lead Driver (Trainer) and observe, perform, operate, ask questions, and show proficiency of the tasks below:

- _____ Observe, perform, and ask questions on all aspects of Pre and Post Trip, explain DVIR (Driver Vehicle Inspection Report) on the driver's tablet and how to submit the DVIR for both pre and post trip inspections.
- _____ Observe, perform, and ask questions of plant protocol and load out procedures (Specifically: Drivers need to check in at location before loading or unloading. Drivers are to be stationed at load out locations at all times to monitor loading and unloading of product and prevent spills. Drivers must "chock the tires" with wheel chocks while loading or unloading)
- _____ Observe and ask questions of safety expectations and company policy on Tanker protocol and procedure (Specifically: Accurate tank identification, tank gauges, buckets under pumps while loading or unloading product, wearing of PPE at all times *safety glasses, work boots, gloves, hard hats and safety vest*
- _____ Observe and perform **"Three Point Contact"** at all times when entering/exiting truck as well as when climbing ladders on company equipment and tanks at customer locations. At no time should a driver stand on top of the trailer while loading or unloading
- _____ Observe, perform, and ask questions about procedure and protocol when delivering a load to a customer location (making sure product is being delivered to the correct customer location, and the correct tank at the customer location)
- _____ Observe, operate, and ask questions of trailer operation (hoses, valves, shut offs, air lines, cam straps and pins).
- _____ Observe and understand that all "spills" should be reported to management immediately-regardless of size. Once management has been notified you will be directed on what steps to take
- _____ Observe, perform and ask questions of dispatch procedure and protocol (what information to send in on GPS for each load)
- _____ Observe, perform, and ask questions on daily paperwork procedure and protocol (BOL's, scale tickets, logs, DVIR's, etc.)
- _____ Observe, perform and ask questions of all Hours of Service daily paperwork and adherence to DOT, Federal, State, and Local laws as well as company policy and procedures. Liquid drivers should be able to differentiate between paper logs, Ag Exemption, and Short Haul Exemption.
- _____ Watch You tube 9 minute Wabash Control Demonstration video of a tank trailer "vacuum collapse" with Safety Coordinator

Comments: _____

*By both the new driver and the lead driver initialing EACH task above and both signing below both the New Driver and the Lead Driver agree the above tasks have been explained and performed to an acceptable level and both agree the New Driver is cleared for equipment and dispatch loads. In order for both drivers to be paid, the Safety Coordinator must sign off on this sheet of paper, please get with him before turning this document into paperwork box.

New Driver Signature: _____ Date: _____

Lead Driver Signature: _____ Date: _____

Operations Manager: _____

Safety Coordinator Signature: _____ Date: _____

DRIVER TRAINING SERIES:

LOAD SECUREMENT

Equipment Inspection & Cargo Securement

- ✓ The guiding principle of Proper Inspection & Cargo Securement is that both your equipment and cargo is being transported on public roads is mechanically sound and the cargo must remain secured to ensure that the motoring public is not put at additional risk from improperly secured materials.
- ✓ This must be met under all conditions that would be reasonably be expected to occur in normal driving.

A driver must perform securement of their product so that during “Normal” and “Reasonable” driving the product does not shift, fall, leak or spill from the container.

Driver’s Loading Responsibilities:

- Tarping of the load is “Required”!
- Tarps are to be on the trailer both “Loaded & Empty”
- Open the tarp “BEFORE” you fill the trailer...
- Sealing the caps and ensuring that you are filling/emptying the correct tank is critical, liquid spills are 100% avoidable...

DRIVER TRAINING SERIES:

MAINTENANCE & INSPECTION

49 CFR 396 – Maintenance & Inspection

Each motor carrier must follow certain maintenance procedures and these procedures must be documented in a written plan.

- ✓ §396.3 & §396.35
- ✓ Every motor carrier shall require its drivers to report, and every driver shall prepare a report in writing at the completion of each day's work on each vehicle operated.
 - ✓ §396.11(a) POST TRIP
- ✓ Every driver shall be "Satisfied" that the vehicle operated is in good repair and safe to operate, prior to use.
 - ✓ §396.13 PRE TRIP

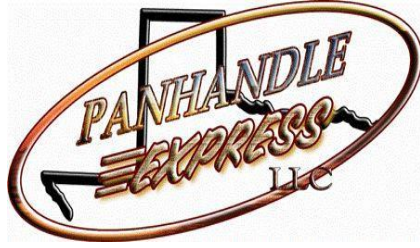
Required Inspection Items

Service Brakes	Windshield Wipers
Parking Brakes	Windshield Defroster
Steering Mechanism	Rear Vision Mirrors
Lighting Devices	Coupling Devices
Reflectors (including tape)	Wheels and Rims
Tires (using gauge)	Emergency Equipment
(extinguisher & triangles)	
Horn	Spare Fuses
Securement Systems	ELD (if required)

Policy for Roadside Inspections

- ✓ Driver Receives Report From Inspection Official, the driver must turn in the ticket as soon as possible. If it will be more than 24 hours the driver must fax/scan/email the report to dispatch.
- ✓ Motor carrier must make repairs of any defective or hazardous issues and signs the report, returning it to the issuing federal or state agency

- ✓ Motor Carrier keeps a copy on file for at least one year, as a supporting document for the maintenance records
- ✓ If the driver received a personal citation for the event, they must report this as well to the motor carrier



NEW DRIVER EXPERIENCE

- Purpose:** To Train, Instill Culture, Communication, Safety
(Simply put, to ensure new drivers are set up for success.)
- Expectations:** Pro Panhandle, Support, Trainee-Success, Follow Up
- Lead Driver:** Communication and Accountability with all Stakeholders

Retention of new drivers will reduce the velocity of the whirlwind!

"A mentor is someone who sees more talent and ability within you, than you see in yourself, and helps bring it out of you."

Bob Proctor

"The mediocre leader tells. The good leader explains. The superior leader demonstrates. The great leader inspires."

Gary Patton

Performance Coaching

1. Build genuine trust

Good coaches connect with everyone in the team. That means moving beyond the superficial to understand individual strengths and weaknesses. For your team to respond well to you as a coach, they must trust you. After all, you're asking them to be introspective, and open enough to discuss how they can maximise their potential.

A good way to gain trust is to demonstrate that you are actively listening. This, means fully concentrating on what is being said, and actively stating that you understand their perspective. Hold one-on-one meetings and, during your discussion, take note. Then give an accurate summary of what your employee has told you (rather than just repeating your end of the discussion). This shows that you're genuinely interested in what they have to say, and invested in their personal development

2. Demonstrate emotional intelligence

As well as active listening skills, you will also need to employ a high degree of emotional intelligence.

It's often quite simple to identify an employee's weak areas. Someone might fear or avoid network events and miss out on valuable business opportunities. The team member is often conscious of the weakness themselves. It takes real skill and emotional intelligence, however, to get to the heart of what's holding an employee back and identify solutions that they are confident in trying.

We've included emotional intelligence in our list of coaching techniques because putting yourself in your team member's shoes and understanding their personal success barriers is key to devising strategies to help overcome them – surely one of the most important roles of a coach.

Many of our team are clinical and occupational psychologists who coach business leaders through these knotty problems with evidence-based skills. They are always on hand as support for the internal coach leader.

3. Motivate, don't de-motivate

There is often risk, notably when teams are pressured, that leadership tips into a directive approach. Rather than motivating, this is likely to have the opposite effect. To improve your leadership style, one of the best coaching techniques is to take some time to reflect on how you're perceived by your team. Are you as approachable as you think you are? Proven methods to find out can be an invaluable tool for you

Learn how to assess your team member's individual career drivers. Learn to understand what truly motivates a broad range of employees, then develop a strategy where you can incorporate their career drivers into the coaching plan. For example, if someone is motivated by status, you could offer the incentive of a new job title or promotion if they show performance improvement. Create a clear set of criteria and time plan for which they can strive to achieve that.

When you do this, you're changing thought processes. Now they're not just doing something because their boss said so. Instead, they're working for their own progression. This is intrinsic motivation. You'll be surprised at what a difference this small change in mindset will do for productivity. When you're able to show your team the **personal** benefits of your business requirements, you know you are doing a successful job as a coach.

4. Lead accountability

Without accountability, long discussions about improvements, incentives and plans have little impact. When Ros Taylor interviewed 80 CEOs from the FTSE 200, one of their top pieces of advice to leaders was to always deliver the goods. If you set actions in a meeting, you must ensure these are met.

Many leaders think they have provided clarity in their discussion about delivery and timepoints only to discover bewilderment about deadlines from team members when the due date looms. All communications should be recorded and a helpful tip is to supply notebooks so that every time you meet, team members record all actions and timelines. Then you check progress at every opportunity. Evidence shows that writing something down is significantly better remembered than computer or tablet input. And remember Delegation isn't dumping. You as a coaching leader need to check progress.

5. Coach with passion

Although strong business experience is essential to a coaching role, an experienced business person does not necessarily make a good coach. Think back to your favourite teacher at school, or professor at university. Often what makes a good teacher isn't based on their academic expertise, but how they inspire others through example and storytelling.

Like teachers, good coaches are genuinely passionate about their subject, and about helping others understand it. If you as a leader are unhappy or demotivated then expecting others to be passionate about your team's success will be doomed to failure.

Questions to ask yourself:

- What are you passionate about at work?
- What are you doing when you lose track of time?

If your current job doesn't deliver joy then look around for other adventures.

6. Develop learning cycles

A good leader knows that learning is never over. Even if you're very experienced leader and already a coach, learning new coaching techniques from highly skilled people and hearing different perspectives can add to your skills. New evidence, as demographics in the work place evolve and change, also enables new techniques to be developed for effective modern-day practice.

There are also limitations as to what an internal coach can achieve. It could be that a problem is more deep-seated than you are comfortable with trying to resolve, or that an issue involves you as the leader. Here at RTC we supply individual coach back up. Even coaches need coaches!