University Vehicle Safe Operator Program

INJURY ILLNESS PREVENTION PROGRAM
This sheet should be completed each time the **University Vehicle Safe Operator Program** is reviewed and/or modified. The Director of Safety and Risk Management is responsible for the review and update this document annually or more frequently as determined or needed per CSU Chancellor’s Executive Order 1039 Occupational Health and Safety Policy, 1069 Risk Management as well as Cal Maritime A&F Policy 09-004 IIPP.

<table>
<thead>
<tr>
<th>Version</th>
<th>Date Approved</th>
<th>Author</th>
<th>Revision Notes:</th>
</tr>
</thead>
</table>
| 1.0     | 06/01/2017    | Marianne Spotorno, CSP  
Dir. Safety & Risk Management | New Program Document |
| 2.0     | 08/01/2019    | Marianne Spotorno, CSP  
Dir. Safety & Risk Management | - Campus Emergency Response update.  
- TSGB component update |
|         |               |        |                 |
|         |               |        |                 |
Table of Contents

General Overview ........................................................................................................................................................ 4

1.0 Purpose and Scope ................................................................................................................................................ 4

1.1 Reference .............................................................................................................................................................. 4

1.2 Useful Websites Resources .................................................................................................................................. 4

2.0 Administrative Duties and Responsibilities ......................................................................................................... 5

2.1 Department of Safety and Risk Management .................................................................................................... 7

2.2 Department Leadership ........................................................................................................................................... 7

2.3 Facilities and Maintenance Department ............................................................................................................. 7

2.4 Authorized Driver ................................................................................................................................................. 7

3.0 Process Management ............................................................................................................................................. 9

3.1 Hazard Assessment ................................................................................................................................................. 9

3.2 License and Other Requirements ........................................................................................................................ 10

3.3 Procedures............................................................................................................................................................. 11

3.3.1 Who may vehicles for the University? .............................................................................................................. 11

3.3.2 University employees ........................................................................................................................................ 11

3.3.3 DMV Pull Notice: ............................................................................................................................................. 11

3.3.4 Defensive Driver Training: .............................................................................................................................. 11

3.4 University Vehicles & Equipment ........................................................................................................................ 11

3.5 Forklift and Aerial Lifts ........................................................................................................................................ 12

3.6 Utility and Golf Carts ........................................................................................................................................... 13

3.7 Ride On, Sit-down Lawn Mowers ........................................................................................................................ 14

3.8 Pre Use Safety Checklist .................................................................................................................................... 14

3.9 Use of Rental Vehicles ....................................................................................................................................... 14

3.10 Privately owned vehicles – Authorization to use for University Business ....................................................... 15

3.11 Vehicle Packet ..................................................................................................................................................... 15

3.12 Misuse of University Vehicles .......................................................................................................................... 15

3.13 Motor Vehicle Accidents .................................................................................................................................... 16

3.13.1 Reporting Vehicle Accidents .......................................................................................................................... 16

3.13.2 Report of Vehicle Accident, STD Form 270 .................................................................................................. 17

3.13.3 Privately Owned and Rental Vehicles .......................................................................................................... 17

3.13.4 Use of Police Accident Reports .................................................................................................................... 18

3.14 Motor Vehicle Liability Insurance ..................................................................................................................... 18

3.15 Repairs and Warranties ...................................................................................................................................... 19

3.15.1 Repairs to CSU Owned Vehicles .................................................................................................................... 19
3.15.2 Warranty Inspection and Repairs ................................................................. 19
3.15.3 Operator Inspection .................................................................................. 19
4.0 Training ........................................................................................................ 20
5.0 Document Retention and Recordkeeping ...................................................... 20
Appendix A: Definitions .................................................................................... 21
Appendix B: Safe Vehicle Positioning ............................................................... 22
Appendix C: Pre Use Inspection Tag ................................................................. 23
Appendix D: Pre Trip Safety Plan ...................................................................... 24
Appendix E: Group Participant List ................................................................. 27
Appendix F: STD Form 261 Authorization to Use Privately Owned Vehicle .... 28
Appendix G STD Form 269 Accident Identification Card ................................ 29
Appendix H: STD Form 270 Vehicle Accident Report ...................................... 30
Appendix I: STD Form 274 State Driver Accident Review ............................... 32
Appendix J: You have had an Accident, Now What? ......................................... 34
General Overview

It is the policy of California State University Maritime Academy to plan and maintain, insofar as it is reasonably within its control to do so, a campus environment for faculty, staff, students, and the public that will not adversely affect their health and safety nor subject them to avoidable risks of accidental injury or illness. University operations shall be conducted in a manner to avoid injuries or illnesses and to comply with all applicable regulations and, when appropriate, with accepted health and safety standards. No student or employee will be required to perform any task which is determined to be unsafe or unreasonably hazardous.

To implement this safety policy, departments and programs will ensure that facilities and equipment meet all federal, state and local safety laws and regulations, and will promulgate, and supervise compliance with appropriate policies, standards and procedures to carry out campus health and safety programs. Employees must also have an avenue to report potential safety hazards without fear of retribution, and with confidence that they will be addressed in a timely manner.

While the overall responsibility for campus health and safety rests with the President, the immediate responsibility for preventing campus accidents belongs to each employee who performs a supervisory role and, finally, to each individual campus employee. Accordingly, all faculty and staff are expected to take whatever actions are necessary to ensure that safe and healthful conditions and practices prevail within the areas under their control.

All members of the campus community are to cooperate fully with all aspects of the University health and safety programs.

1.0 Purpose and Scope

CSU policy requires that all employees who drive State, or privately owned vehicles, (including rental vehicles, power carts, tractors, forklifts, 10+ passenger vans and any other powered vehicles), on University (State) business be identified and authorized by the campus Department of Safety and Risk Management (SRM) office.

It is CSU policy that only University employees may drive University vehicles. Employees of non-state entities, or students driving on University business, must be an identified State Volunteer in order to drive on University business. University business is defined as “only when driven in the performance of, or necessary to, or in the course of, the duties of University employment.”

This Manual applies to all Cal Maritime operations, maintenance and construction activities under the supervision of Cal Maritime personnel. For activities associated with the Training Ship Golden Bear (TSGB) refer to the Vessel Operating Manual (VOM) and/or Shoreside Administrative Manual (SAM). The TSGB is a subject specific component that supports the overall University IIPP.

1.1 Reference
- California State University (CSU) Policy Guidelines, Executive Orders 1039
- Cal Maritime Policy AF 09-004
- Cal Maritime Programs: Injury Illness Prevention Program, Powered Industrial Truck (Forklift) Plan, Aerial Lift Plan.
- California Labor Code Section 6401.7 (Chapter 1369, Statutes 1989); California Code of Regulations, Title 8, Sections 1509 and 3203;

1.2 Useful Websites Resources
- ORIM/Department of General Services online Defensive Driver Training: http://www.dgs.ca.gov/orim/Programs/DDTOnlineTraining.aspx
- DMV Employee Pull Notice Program: http://www.dmv.ca.gov/vehindustry/epn/epngeninfo.htm
- Official California Legislative Information: http://www.leginfo.ca.gov/
2.0 Administrative Duties and Responsibilities

It is the policy of the Cal Maritime to maintain a safe and healthy work environment for each employee (including student and contract employees), and to comply with all applicable occupational health and safety regulations. This Injury and Illness Prevention Program (IIPP) is intended to establish a framework for identifying and correcting workplace hazards within the department, while addressing legal requirements for a formal, written IIPP.

To assist Cal Maritime in providing a safe, compliant, environmentally sound, and more sustainable operation, each department or operational unit is expected to review, understand, and follow the guidance provided in the Injury Illness Prevention Program components and the function of the integrated campus safety management system (ICSMS) as related to operations under their control.

In a proactive behavior based environmental health and safety model that entire campus community participation reflects a process that embraces the ability to;

- Eliminate adverse conditions which may result in injury or illness,
- Recommend the establishment of programs to raise safety consciousness in the community, and
- Achieve and maintain a beneficial relationship through continuing communication on issues relating to environmental health and occupational safety.

2.1 Employees (Including Student workers)

It is the responsibility of all faculty and staff to proactively participate and subsequently comply with all applicable health and safety regulations, Cal Maritime policies, and established safe work practices. This includes, but is not limited to:

- Observing health and safety-related signs, posters, warning signals and directions.
- Learning about the potential hazards of assigned tasks and work areas.
- Taking part in appropriate health and safety training.
- Following all safe operating procedures and precautions.
- Participating in workplace safety inspections
- Using proper personal protective equipment.
- Inform coworkers and supervisors of defective equipment and other workplace hazards without fear of reprisal.
- Reviewing the building emergency plan and assembly area.
- Reporting unsafe conditions immediately to a supervisor, and stopping work if an imminent hazard is presented.

2.2 Department of Safety and Risk Management (SRM)

The Director of Safety and Risk Management (SRM), as delegated by the University President, is responsible for the implementation and administrative management for Cal Maritime’s Injury Illness Prevention Program (IIPP) that meets the requirements of California Code of Regulations (CCR), Title 8, section 3203) as well as other applicable California and Federal Occupational Safety and Health (Cal-OSHA) requirements. This Program represents a best management safe work practice or regulatory specific component of the IIPP.

Further responsibilities are outlined below:

- Provide advice and guidance to all university personnel concerning IIPP compliance requirements;
- Provide centralized monitoring of campus activities related to implementation of campus IIPP;
- Ensure scheduled periodic safety inspections are performed in compliance with regulatory requirements and assist management staff in identifying unsafe or unhealthful conditions;
- Ensure safety and health training programs comply with regulatory requirements and university policy;
- Oversee the maintenance of safety and health records consistent with the requirements of this document and regulatory mandates;
- Ensure program audits, both scheduled and as required by a process, equipment or personnel change, or by a safety program mandate, are performed;
• Interpret existing or pending safety and health legislation and recommend appropriate compliance strategies to university personnel;
• Maintain centralized environmental and employee monitoring records, allowing employee access as directed by law.

2.3 Deans, Directors, Department or Operating Unit Management (DM)
Campus Department or Operating Unit Head Management (DM) have an integral campus role and shall have a thorough understanding of Injury Illness Prevention Program components and the function of the integrated campus safety management system (ICSMS) as related to operations under their control.

- The DM have primary authority and responsibility to ensure the health and safety of the department’s faculty, staff and students through the implementation of the Injury Illness Prevention Program components. This is accomplished through a collaborative approach with SRM by communicating Cal Maritime’s campus emphasis on health and safety, analyzing work procedures for hazard identification and correction, ensuring regular workplace inspections, providing health and safety training, and encouraging prompt employee reporting of health and safety concerns without fear of reprisal.
- The “Owner Department” is responsible to identify hazardous activities in their workplace and design into locations engineering controls such as guards, barriers, edge protection, etc., to prevent access to a known hazard. Only when engineering controls cannot be used or implemented, personal protective equipment (PPE) may be used to aid in controlling hazards to personnel in a Department’s operation.
- The department owning or exposing personnel to hazards is responsible for the selection of the proper equipment based upon a hazard analysis of work tasks. In addition, Owner Departments must ensure regulatory applicable training is provided to their personnel who use the equipment, keep the records of training completed, and schedule periodic inspections of all equipment under their ownership or control.
- Toward this end, the Department owning the equipment must:
  - Notify SRM of training needs to designated personnel. Refer to section 4 of this document for training requirements applicable to this Program.
  - Notify SRM when new equipment is purchased so that it can be inspected and added to the JHA and Equipment inventory.
  - Schedule with SRM a periodic inspection.
  - Render unusable and then dispose of any equipment that is in any way questionably unsafe as determined by the inspector or the person using the equipment.
- DM’s are encouraged to designate an individual as the department safety coordinator, to assist with the specific operational environmental, health and safety process management components.

2.4 Supervisors and Principal Investigators
Supervisors play a key role in the implementation of the Cal Maritime’s Injury Illness Prevention Program components. Supervisors may be Management, Senior Research Associates, Department Chairs, Principal Investigators, or others who oversee a project and/or staff. They are responsible for but not limited to:

- Communicating to their staff and students about Cal Maritime campus’s emphasis on health and safety.
- Ensuring periodic, documented inspection of workplaces under their authority.
- Promptly correcting identified hazards.
- Modeling and enforcing safe and healthful work practices.
- Providing appropriate safety training and personal protective equipment.
- Implementing measures to eliminate or control workplace hazards.
- Stopping any employee’s work that poses an imminent hazard to either the employee or any other individual.
- Encouraging employees to report health and safety issues without fear of reprisal.

2.5 Academic Programming Faculty and Advisors
It is the responsibility of Faculty, Academic Programming Advisors other Cal Maritime related activities and student clubs to:

- Develop procedures to ensure effective compliance and support of the Injury and Illness Prevention Program
components as it relates to operations under their control. Specific areas of responsibility include student education and training, identification and correction of unsafe conditions, and incident reporting.

- Develop and maintain written classroom, laboratory, and activity procedures which conform to regulatory, campus and departmental guidelines.
- Instruct students in the recognition, avoidance, and response to unsafe conditions, including hazards associated with non-routine tasks and emergency operations.
- Permit only those persons qualified by education and training to operate potentially hazardous equipment or use hazardous materials, unless under close supervision.
- Supervise students in the performance of activities.

2.6 Students- Cadets

Students are expected to always adhere to safety practices presented by faculty, technical staff, student assistants, graduate assistants or other authorized individuals. They must also report potentially hazardous conditions that become known to them. These reports should be made to their supervisors, faculty advisers, Department of Safety and Risk Management, or other responsible parties.

2.1 Department of Safety and Risk Management is responsible for the development and administrative management of the Vehicle Operator Safety Program.

- SRM ensures the validity and status of individual driver’s licenses through the use of the California Department of Vehicles (DMV) Pull Program.
- Coordinates and tracks Defensive Driver Training and issues Defensive Driving waivers when applicable.
- Coordinates vehicle guidelines, policy, and insurance as well as accident issues.
- Provides Forklift and Aerial lift equipment training. See Forklift or Aerial Plans for more details.
- Provides small vehicle/utility cart training. See Small Vehicle/Utility Cart Plan.

2.2 Department Management will:

- Coordinate with Procurement to acquire, maintain and repair the necessary vehicle(s) to support departmental operations.
- Shall ensure the vehicle is maintained, repair and replaced in accordance with manufacturer’s recommendations as well as departmental, University or CSU-System wide requirements.
- As a means of preventative maintenance, all vehicles will have daily pre-use checks.
- The department manager or designate shall keep current with and derive full benefit from engineering advances, warranty policies, modifications and dealer services.
- Ensures travel requests are properly completed prior to any travel by a University employee or student.
- Verifies that the traveler is a “University Employee” as described above.
- Authorizes travel and determines the Form 261 is current and on file.
- Will coordinate the acquisition of rental vehicles and issuance/retrieval of vehicle keys and roadside emergency kits. No rental cars may be stored on campus when not actively under a rental agreement.
- Provide a list of current “Authorized Drivers” to the Department of Safety and Risk Management.
- Ensure that department assigned vehicles are kept clean and properly functioning, including adhering to maintenance schedule per the manufacturers requirements and recommendation.

2.3 Facilities and Maintenance Department may:

- Assist with the coordination of service and routine maintenance of the individual department issued vehicles.

2.4 Authorized Driver is responsible for:

- Only University employees age 18 and over (age 21 and over for rental vehicles) with the following criteria:
  - Valid State Driver’s License
- Class B license with passenger endorsement and Medical Certificate required by the University to drive 15 passenger vans
  - Participant in the California DMV Pull Notice Program
    - Clean DMV: California Vehicle Code 12810.5a and 12810.5b address the DMV's “negligent operator violation points”.
    - Have not been issued more than three moving violations or been judged responsible for more than three accidents or any combination of three during the last 12 months.
  - Completed Defensive Driving Training Course
    - Complete University approved Passenger Van Safety Training prior to driving 10+ passenger vans and every 2 years thereafter of employment and assignment.
  - Authorized in writing by a Unit or Program Manager (Dean, Director, etc.) authorized to grant such approval
- The safe operation of the vehicle and the safety of the passengers.
- The Driver shall ensure all motor vehicle safe operation laws are followed.
- The Driver will perform a pre-use inspection of the vehicle on their assigned vehicles and inform the department management if problems are noted.
- Operating the equipment in accordance to design and function.
- Where driving is an essential function of the job, employment offers will be conditional upon verification of the possession of a valid United States state’s driver’s license and a safe driving record. This verification will be completed as part of a background check conducted by the Office of Human Resources.
### 3.0 Process Management

#### 3.1 Hazard Assessment

<table>
<thead>
<tr>
<th>Task</th>
<th>Hazard</th>
<th>Control</th>
</tr>
</thead>
</table>
| Vehicle Operation | Vehicle Accidents | - Practice safe driving techniques  
- Do not follow too closely  
- Engine power is managed to ensure efficiency of truck movements and to minimize damage to the engine and gears  
- Engine power is coordinated with gear selection ensuring smooth transition and operation within torque range  
- Tip truck is operated to work instructions in accordance with company operating procedures  
- Road/traffic conditions are constantly monitored taking into account of road standards, traffic flow, distance and load, ensuring no injury to people or damage to property, equipment, loads and facilities  
- Vehicle is brought to a halt smoothly, minimizing the wear and tear on vehicle using the engine retarder, gears and brakes |
| Load, transport and tip materials |  | - Vehicle is positioned at load and discharge points with a minimum of maneuver  
- Tip truck movements including the raising and lowering of the tray are smooth and controlled  
- Weight and distribution of load is assessed for type of material and size of vehicle to ensure it is within vehicle capacity  
- Safety and security of load, including load cover requirements, are maintained from loading site to discharge site  
- Load is discharged on slope and/or over face at fill site in accordance with safe operating techniques and company operating procedures  
- Tray is cleared, lowered and secured before resuming travel in accordance with manufacturers' instructions |
| Fatigue Particulates (dust) Weather Insects and animals Walking surfaces Fog or other low visibility conditions |  | - Employees shall not operate a motor vehicle while under the influence of alcohol and drugs nor while sick or suffering from excessive fatigue or emotional stress.  
- Drivers/Operators. Drivers/operators have the responsibility to:  
  - Inform their supervisors of any physical, mental, or emotional condition that might impair their ability to safely drive a motorized vehicle or operate machinery.  
  - Know and observe all State and local traffic regulations.  
  - Check the windshield, wipers, and wiper fluid level.  
  - Adjust mirrors.  
  - Drive safely while operating the vehicle within its mechanical limits.  
  - Always wear your safety belt(s). The vehicle operator shall ensure passengers also wear safety belts.  
  - Monitor vehicle performance when driving.  
  - Inspect a vehicle after use. Correct or report problems before a vehicle is used again.  
  - Do not compromise your safety, the safety of your passengers, or public safety when driving.  
  - Pull off the road for a break or to change drivers if you experience any of these warning signs:  
    - Vehicle begins to feel too warm.  
    - Drowsiness, especially after meals.  
    - Eyestrain.  
    - Inattention, daydreaming. |
|  | Work/rest guidelines | Vehicle operators must comply with these work/rest guidelines. Operate a vehicle Only if you have had at least 8 consecutive hours off duty before beginning a shift. |
|  | Equipment | Ensure that Government vehicles are equipped with:  
Safety belts for all passengers. Refer to 49 CFR 392.9 for exception of bus passengers.  
Warning markers or reflectors and flashlight. |
First aid kit. The standard first aid kit in all Government vehicles must contain two packets of the standard protective equipment (rubber gloves, face masks, eye protection, and cardiopulmonary resuscitation (CPR) clear-mouth barrier).

Fire extinguishers

**Defensive driving techniques.** Drive slowly and use transmission gearing, engine compression, and gravity to slow the vehicle as it travels uphill. Conversely, use engine compression and gearing on downhill grades.

Do not use cell phones while driving. Have a passenger answer the phone for you or pull off to side of the road.

Keep right. Drive as far to the right as possible without driving on the shoulder.

<table>
<thead>
<tr>
<th>Park vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Struck by oncoming traffic</td>
</tr>
<tr>
<td>Hit other vehicle</td>
</tr>
<tr>
<td>Vehicle on uneven, soft ground</td>
</tr>
<tr>
<td>Vehicle may roll.</td>
</tr>
<tr>
<td>- Drive to area well clear of traffic.</td>
</tr>
<tr>
<td>- Turn on emergency flashers</td>
</tr>
<tr>
<td>- Choose a firm, level area</td>
</tr>
<tr>
<td>- Apply the parking brake; leave transmission in gear (if manual transmission) or in PARK.</td>
</tr>
</tbody>
</table>

### 3.2 License and Other Requirements.

<table>
<thead>
<tr>
<th>Utility Vehicle</th>
<th>Equipment Operator</th>
<th>Sedan /SUV 6</th>
<th>8-12 Passenger Van</th>
<th>Personal Sedan/SUV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utility Cart, Golf Cart</td>
<td>Lawnmowers, or other riding equipment</td>
<td>Forklift, Aerial Lift, or other heavy equipment</td>
<td>6 Passengers including driver</td>
<td>8-12 passengers including driver</td>
</tr>
<tr>
<td>Copy of a valid California driver’s license.</td>
<td>Copy of a valid California driver’s license.</td>
<td>Copy of a valid California driver’s license.</td>
<td>Copy of appropriate valid California driver’s license.*</td>
<td>Copy of a valid California driver’s license.</td>
</tr>
<tr>
<td>Specific equipment training certificate</td>
<td>Specific equipment training certificate</td>
<td>Specific equipment training certificate and operator card as applicable</td>
<td>(New employees must also submit a current DMV printout), along with an Employee Pull notice form on file.</td>
<td>(New employees must also submit a current DMV printout), along with an Employee Pull notice form on file.</td>
</tr>
<tr>
<td>Practical Skills assessment</td>
<td>Practical Skills assessment</td>
<td>Defensive Driver Training</td>
<td>Defensive Driver Training</td>
<td>Defensive Driver Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Basic First Aid</td>
<td>Basic First Aid</td>
<td>Authorization to Use Privately Owned Vehicles on District Business form (to be renewed annually).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Large Capacity Van Operator Safety Training</td>
</tr>
</tbody>
</table>

*NOTE: State of California Licensing Requirements*
California Vehicle Code Section 15278 requires an endorsement issued by the department to operate any commercial motor vehicle that is any of the following:

(2) **A passenger transportation vehicle which includes**, but is not limited to, a **bus**, farm labor vehicle, or general public paratransit vehicle when designed, used, or maintained to carry **more than 10 persons including the driver**.

**California Vehicle Code Section 233**: b) A vehicle designed, used, or maintained for carrying more than 10 persons, including the driver, which is used to transport persons for compensation or profit, or is used by any nonprofit organization or group, is also a bus.

*Vehicle Code sec. 233(b) does not apply to the State, although it does apply to a CSU auxiliary organization.*

### 3.3 Procedures.

- In the performance of necessary duties of Cal Maritime employment.
- Only in the course of conducting business for the University.

#### 3.3.1 Who may vehicles for the University?

Only University employees age 18 and over (age 21 and over for rental vehicles) with the following criteria:

- Valid State Driver’s License
- Clean DMV: California Vehicle Code 12810.5a and 12810.5b address the DMV’s “negligent operator violation points”.
- Completed Defensive Driving Course
- Authorized in writing by a Unit or Program Manager (Dean, Director, etc.) authorized to grant such approval

**3.3.2 University employees** are those persons who have completed all prerequisites to CSU employment. This includes all faculty, staff, student assistants and those on volunteer status (Job Class Code 0050). *(University employees are issued pay checks from the State of California. If a pay check is issued by another source, these individuals need to be made Volunteer Employees and complete the appropriate form available through Human Resources. This form must also be completed by any Cal Maritime student who is driving and non-employees driving on behalf of a University grant/trust account.)*

**3.3.3 DMV Pull Notice:** Every employee and volunteer is added by Safety and Risk Management to the DMV Pull Program that provides notification of any change in license status or offenses. When an employee has been involved in accidents or received traffic citations of such numbers or gravity as to be a matter of concern, permission to drive University vehicles or drive on University business may be restricted or declined.

**3.3.4 Defensive Driver Training:** Drivers must complete the online CSU approved DGS Training located on Skillport for employees and the DGS webpage for students. If the driver has not completed this class, a temporary Defensive Driver Waiver which permits the person to drive a University or privately-owned vehicle may be granted. This waiver is only valid for a single trip.

- The State Office of Risk Management’s (DGS) on-line defensive driving training can be accessed at [http://www.dgs.ca.gov/orim/Programs/DDTOnlineTraining.aspx](http://www.dgs.ca.gov/orim/Programs/DDTOnlineTraining.aspx).

### 3.4 University Vehicles & Equipment

University Vehicles are vehicles designed for land transportation and are owned, leased or rented by the University. University vehicles include all motorized or self-propelled equipment including lawn mowers, golf carts, etc.

- Motorcycles do not qualify for use as University vehicles, except for motorcycles used by Public Safety for law enforcement purposes and approved by the University President.
- The University Motor Pool oversees the approval for use, assignment and release of University vehicles.
- No smoking is allowed in University vehicles
- No animals, except for those designated as service support, are allowed in University vehicles.
• Vehicles must be kept clean and free from loose debris that could interfere with the driver or impact the passengers safety.
• Dashboards must be keep clear of all loose debris.
• The use of large capacity 10-12 passenger vans will require additional Van Safety Training facilitated by the Department of Safety and Risk Management.
  o Passenger vans handle differently than smaller passenger vehicles because they are typically longer, higher, and wider. They require additional reliance on the side mirrors for changing lanes, more space, additional braking distances, and have a higher risk of crashes and rollovers if not properly driven and maintained.
  o A Class B with passenger endorsement license will be require when used by Auxiliary operations that operate under a 501.c3
  o As a means of ensuring knowledge, skills and abilities associated with the operation of large capacity vehicles, Cal Maritime recommends that users maintained Class B Driver's license with a passenger endorsement regardless of business classification within the University.

3.5 Forklift and Aerial Lifts

Only drivers authorized by the University and trained in the safe operations of industrial trucks or industrial tow tractors shall be permitted to operate such vehicles.
• Stunt driving and horseplay are prohibited.
• No riders shall be permitted on vehicles unless equipped with manufactures engineered attachment design for personnel lifting.
• Employees shall not ride on the forks of lift trucks.
• Employees shall not place any part of their bodies outside the running lines of an industrial truck or between mast uprights or other parts of the truck where shear or crushing hazards exist.
• Employees shall not be allowed to stand, pass, or work under the elevated portion of any industrial truck, loaded or empty, unless it is effectively blocked to prevent it from falling.
• Drivers shall check the vehicle at least once per shift, and if it is found to be unsafe, the matter shall be reported immediately to a supervisor or Transportation Services, and the vehicle shall not be put in service again until it has been made safe. Attention shall be given to the proper functioning of tires, horn, lights, battery, controller, brakes, steering mechanism, cooling system, and the lift system for fork lifts (forks, chains, cable, and limit switches).
• No truck shall be operated with a leak in the fuel system.
• Vehicles shall not exceed the authorized or safe speed, always maintaining a safe distance from other vehicles, keeping the truck under positive control at all times and all established traffic regulations shall be observed.
• For trucks traveling in the same direction:
  o A safe distance shall be considered to be approximately 3 truck lengths or preferably a time lapse of 3 seconds passing the same point.
• Trucks traveling in the same direction shall not be passed at intersections, blind spots, or dangerous locations.
• The driver shall slow down and sound the horn at cross aisles and other locations where vision is obstructed. If the load being carried obstructs forward view, the driver shall be required to travel with the load trailing.
• Operators shall look in the direction of travel and shall not move a vehicle until certain that all persons are in the clear.
• Trucks shall not be driven up to anyone standing in front of a bench or other fixed object of such size that the person could be caught between the truck and object.
• Grades shall be ascended or descended slowly.
  o When ascending or descending grades in excess of 10 percent, loaded trucks shall be driven with the load upgrade.
  o On all grades the load and load engaging means shall be tilted back if applicable, and raised only as far as necessary to clear the road surface.
• Motorized hand and hand/rider trucks shall be operated on all grades with the load engaging means downgrade.
• The forks shall always be carried as low as possible, consistent with safe operations. When leaving a vehicle
unattended, either:
- The power shall be shut off, brakes set, the mast brought to the vertical position, and forks left in the down position.
- When left on an incline, the wheels shall be blocked; or
- The power may remain on provided the brakes are set, the mast is brought to the vertical position, forks are left in the down position, and the wheels shall be blocked, front and rear.
- Note: When the operator is over 25 feet (7.6 meters) from or out of sight of the industrial truck, the vehicle is considered unattended.

- When the operator of an industrial truck is dismounted and within 25 feet (7.6 meters) of the truck, which remains in the operator’s view, the load engaging means shall be fully lowered, controls placed in neutral, and the brakes set to prevent movement.
  - Exception: Forks on fork equipped industrial trucks may be in the raised position for loading and unloading if the forks are raised no more than 42 inches above the level where the operator/loaders are standing and the power is shut off, controls placed in neutral and the brakes set. If on an incline, the wheels shall be blocked.

3.6 Utility and Golf Carts
The operation of small vehicles at Cal Maritime is a privilege. The following operating rules pertain to both electric and gasoline operated small vehicles.
- Only drivers authorized by the University and who are trained in the safe operation of small vehicles shall be permitted to operate such vehicles.
- All new vehicle operators must receive training before they are allowed to operate a small vehicle, with records of training provided to the Department of Safety and Risk Management.
- Stunt driving and horseplay are prohibited.
- No passengers will be permitted on vehicles unless provided with adequate seating. No one is permitted to ride on the running boards, fenders or any part of the vehicle other than the seats.
- It shall be unlawful for any driver of a vehicle to fail to obey any sign or signal erected or maintained by the University to regulate the flow of traffic.
- Operators or passengers shall not jump on or off vehicles in motion.
- Vehicles must slow down for turns.
- Vehicles should only be driven on University streets and/or on designated routes. Other routes shall only be used with prior approval from University Police. Failure to follow designated routes is punishable under University Parking and Traffic Ordinances.
- Vehicles may not be driven outside the campus boundaries.
- Vehicles should not exceed a speed safe for conditions. In the event a sidewalk must be used, speed should be no faster than the average pedestrian. Otherwise, vehicles shall not exceed 10 mph on all inner campus pathways, and shall not exceed 25 mph on campus perimeter roadway.
- Operators shall be familiar with and observe all established traffic laws. Citations will be issued for violation of traffic and speed laws.
- Materials and equipment shall be loaded so they will not cause a hazard by shifting or falling off.
- Top heavy equipment is especially dangerous and should be secured near the center of the vehicle to avoid tipping. Be extremely careful during turning maneuvers. Vehicles are particularly subject to tipping on uneven athletic fields and curbing.
- No vehicle and/or trailer shall be operated at night without properly working headlights and taillights.
- Safety belts must be used when provided.
- Vehicles can only be driven on the campus main quad (painted compass rose) area when:
  - Access to a particular facility is required by a disabled person or safety escort,
  - Delivery or pickup of setup materials for a special event (i.e. displays, vendors, etc.), OR
  - As necessary for maintenance vehicles.
- Drivers and riders of all-terrain vehicles on public property must comply with Vehicle Code Section 38505 and wear
a safety helmet meeting requirements pursuant to section 27802 for motorcycle and motorize bicycles.

- All vehicles must be driven in compliance with California Vehicle Code, all University rules and regulations and all other applicable codes.

### 3.7 Ride On, Sit-down Lawn Mowers

**AS GOVERNED BY CAL-OSHA ARTICLE 20 OF THE GENERAL INDUSTRY SAFETY ORDERS §3563. POWER LAWN MOWERS:**

These regulations apply to power lawn mowers and cover walk-behind reel and rotary power lawn mowers, riding reel and rotary power lawn mowers, lawn riding tractors with mower attachments, and lawn and garden riding tractors with mower attachments. They are intended to provide safety requirements and to help ensure uniform operator environments. These regulations do not apply to sulky-type units, flail mowers, sickle bar mowers, or tractors as defined in Article 25 of these Orders unless the tractor is designed primarily for mowing lawns and manufactured in conformance with the ANSI B71.1 or B71.4 national consensus standards for power lawn mowers.

**Prohibited use of Ride-on, Sit-down Lawn Mowers.**

- Ride-on, sit-down lawn mowers shall not be used on slopes that exceed the angle limitation when specified by the manufacturer.
- When the manufacturer’s instructions are not obtainable or do not specify the angle limits for operating ride-on, sit-down lawn mowers on sloped surfaces, a qualified person shall evaluate the terrain and slope conditions to ensure the mower is operated in a safe manner.
- Ride-on, sit-down lawn mowers shall not be operated in areas where the traction drive wheels, as measured from the outside wheel edge, are within 5 feet of the unprotected edges of retaining walls, embankments, levees, ditches, culverts, excavations or similar locations that present an overturn hazard.
- When it is necessary to operate a ride-on, sit-down mower near ponds, creeks, reservoirs, canals, sloughs, lakes, golf course water hazards and similar bodies of water, a qualified person shall evaluate the terrain and any slope conditions to ensure the mower is operated at safe speeds and at safe distances from such hazards

### 3.8 Pre Use Safety Checklist

- In order to ensure the safe operation of all vehicles and equipment as well as ensure they are maintained at the highest level a pre-use safety checklist of every vehicle is required for before placing the vehicle in operation for the day.
- Vehicles that are utilized by multiple drivers throughout the day or trip are responsible for confirming a vehicle inspection has been performed prior to operate it.
- Deficiencies are to be noted on the form and immediately communicated to department management upon discovery. Any safety critical systems that are found deficient will deem the unsafe, and thus be placed out of service until repair

### 3.9 Use of Rental Vehicles

- Each Department is responsible for the facilitation and coordination of rental vehicles to support their own departmental operation.
  - Department leadership will work directly with rental agency and Cal Maritime Procurement.
- University employees (age 21 and over) may rent a vehicle under the State’s care rental agreement negotiated by the State.
- Rentals must be covered by the insurance policy provided by the car rental agency as a provision of the State contract.
- Employees who are in an accident while driving a state contract rental car must complete the Standard forms 270 and 274 and submit to the Department of Safety & Risk Management within 24-hours of the accident, so that SRM can review and forward to the State Office of Risk Management within 48-hours of the accident.
University Vehicle Safe Operator Program

- 15-passenger van prohibition: Vans that carry 15 passengers may not be used, rented, purchased, or leased by the University.

3.10 Privately owned vehicles – Authorization to use for University Business.
Departmental and Divisional Management have the responsibility for authorizing persons to drive privately owned vehicles to conduct official University or State business. This responsibility may be delegated to the lowest practical supervisory level who can exercise proper control. Before a person may be authorized to use a privately owned vehicle to conduct University or State business, the person must certify in writing that the vehicle used will always be:

- Covered by liability insurance in at least the following amounts:
  - $15,000 for personal injury to, or death of, one person,
  - $30,000 for personal injury to two or more persons in one accident, and
  - $5,000 for property damage;
- Adequate for the work to be performed;
- Equipped with safety belts in operating condition; and
- In safe mechanical condition as required by law.

This certification will be recorded on Std. Form 261, Authorization to Use Privately Owned Vehicles on University or State business.

The completed authorization form shall be retained by the supervisor empowered to approve the use of privately owned vehicles as well as in the employee’s employment file located in Human Resources.

Authorization forms will be valid for a period not to exceed one year. Once completed, Std. Form 261 may be initialed and dated annually by the employee to certify that it is current.

The supervisor shall verify that there is a fully executed current authorization form on file before signing a Travel Expense Claim, for the claimant. This will help assure that the person is aware that the coverage must be provided by the person’s insurance rather than through any State sponsored insurance program. The person’s signature on the Travel Expense Claim shall certify that the minimum insurance and safety requirements were in effect and had been properly recorded before the privately owned vehicle was used.

Each person who plans to drive a privately owned vehicle should be aware that the liability coverage maintained by the University/State (ORIM) is only applicable to that liability of the person which is over and above the liability insurance maintained by the person. (Insurance Code 11580.9)

Note: The vehicle owner’s liability insurance is primary, the state’s insurance is secondary.

3.11 Vehicle Packet
Each vehicle is to be equipped with emergency response information. Depending on the type and use of vehicle additional emergency support supplies may be required.

- Vehicles traveling off campus will be required to have individual packets that include a map with the route clearly marked to the destination.
- Multiple vehicles traveling to the same location must have their own Vehicle Packet so that they are not relying on the first vehicle to directions.

3.12 Misuse of University Vehicles
The following conditions are considered to be a misuse of University vehicles:

- Driving a University vehicle without authorization by proper University officials.
• Driving without a valid California or other State operator’s license of the appropriate class for the type of vehicle being driven.
• Permitting a person who is not a University employee to drive a University vehicle.
• Engaging in unsafe practices, including failure to use and to ensure that all passengers use all available safety equipment in the vehicle being operated. Safety equipment includes seat belts and/or shoulder harnesses.
• Falsification of travel logs, travel authorizations, defensive driver training program certificates, accident reports, or other forms relative to the use of the vehicle.
• Improper storage or parking of University vehicle.
• Personal use or conveying passengers other than persons directly involved with University or State business, except with the approval of employee’s immediate supervisor.
• Failure to comply with any law, regulation, or policy regarding the use of University vehicles, including the requirement to have satisfactorily completed a CSU approved defensive driver training course. Employees misusing University vehicles may be personally liable for damages to persons or property caused to third parties and the legal expenses of defense. Employees who misuse University vehicles may also be subject to disciplinary action by the University.

3.13 Motor Vehicle Accidents

All incidents regardless of severity, are to be immediately reported to department management and the Department of Safety and Risk Management.

University employees involved in an accident while driving a University or State owned vehicle, or a privately owned vehicle on official University or State business, will make no comment or statement regarding the accident to anyone except police, other State officers or employees, or an identified representative of the State’s contract adjuster.

Subsequent to any accident involving a University or State-owned, or rental vehicle, or a privately owned vehicle driven on official University or State business, all communications regarding claims, including summons and complaints, must be forwarded immediately to the Office of General Counsel in the Chancellor’s Office, with a copy to the Office of Risk and Insurance Management, Department of General Services (ORIM) and Systemwide Risk Management & Public Safety for disposition. The transmittal letter should include the date and place of service, together with any other pertinent information.

SUPERVISOR’S REVIEW

The designated manager of each driver involved in an accident will take the following actions:

• Investigate each accident promptly and thoroughly.
• The designated manager who authorized or permitted the employee to use the vehicle will ensure that the employee completes the Std. Form 270 or will do it for him/her if the employee is unable to do so. The supervisor will also inform the Auto Liability Self Insurance Unit (ORIM) when the employee is unable to do so.
• Prepare a Supervisor’s Review of State Driver Accident, Std. Form 274, or an equivalent report. (It is recommended that the agency copy of the completed Std. Form 270 Appendix A-4 be used for reference when preparing a Std. Form 274 or equivalent report
• The purpose of Std. Form 274 or equivalent report is to aid in preventing University employee driver accidents. It will be used to determine if the accident was avoidable and what actions the driver should have taken to avoid the accident. It will also be used to determine specific needs for accident prevention training and in the establishment of administrative policy.
• Initiate any appropriate corrective action, verbal or written, and record corrective action taken in departmental personnel records.
• Forward copies of the completed form to the Department of Safety and Risk Management within 12-hours.

3.13.1 Reporting Vehicle Accidents

The driver of a University or State-owned or rental vehicle involved in an accident will record all pertinent information on the Accident Identification Card, Std. Form 269, before leaving the scene of the accident. If another vehicle is involved, the
appropriate portion of the Std. Form 269 will be detached and given to the driver of the other vehicle. Blank Accident Identification Cards should be found in the glove compartment of each University or State-owned vehicle.

All vehicle accidents which result in injury to any person, or which involve significant damage to property must be reported immediately by telephone (916-376-5302) or FAX (916-376-5277) to the ORIM in Sacramento. If an accident involving bodily injury or significant property damage occurs on a weekend, call (916) 376-5295 and leave a voice mail message. The caller will be contacted on the next business day for more details. In addition to reporting to ORIM, a copy of the report should also be forwarded to the Office of General Counsel and Systemwide Risk Management & Public Safety in the Chancellor’s Office.

3.13.2 Report of Vehicle Accident, STD Form 270
All motor vehicle accidents involving a University or State-owned vehicle or any vehicle being used on University or State business must submit form STD 270 to Campus Director of Safety and Risk Management within 12-hours and then to the ORIM at 707 Third Street, First Floor, West Sacramento, CA 95605, within 48 hours. Refer claimants or their representative (insurance carrier, rental car agency, and attorney) who may contact you directly to ORIM.

Claimants can call (916) 376-5302 or 1-800-900-3645. Reporting the accident by telephone does not replace the need to send the Std. Form 270 within 48 hours to ORIM. Additional instructions are shown on the Std. Form 269. University employees involved in a vehicle accident while on University or State business will comply with those instructions and retain the card for review by the supervisor and as an aid in the completion of other accident reporting forms. Please refer to ORIM’s “Ok, You’ve Had a Motor Vehicle Accident, So Now What Happens?” hand-out.

When a University or State vehicle is struck while parked unattended and the damage is under $1,000.00, and the name (or license number) of the party causing the damage is unknown, Std. Form 270 (Appendix A-4) must be completed; in similar cases where the damage is over $1,000.00, the custodian of the vehicle will complete only that portion of Std. Form 270 listing identification of custodian and vehicle, location, time damage probably occurred, and signature. Campuses are responsible for developing a policy and procedure for addressing those occasions where damages are incurred to an unoccupied University or State vehicle.

For Department of General Services, Office of Fleet Administration “pool” vehicles only, a Std. Form 269, Accident Identification Card, and a Std. Form 270 can be found in the glove compartment. ORIM has contracted with a private adjusting company to conduct accident investigation and adjusting services upon ORIM’s request. Employees contacted by a representative of this contractor may verify that they have been retained by ORIM by calling (916) 376-5302.

3.13.3 Privately Owned and Rental Vehicles

PRIVATELY OWNED VEHICLES
An accident that involves a privately owned car or commercial automobile rental being driven on University or State business will be reported on Std. Form 270. The report should be clearly marked “Privately Owned Vehicle Involved” or “Rental Vehicle.”

The original form should be sent to ORIM; while a copy is retained by the campus with an additional copy retained by the University employee-driver.

RENTAL VEHICLES
When university employees rent a vehicle under the State of California car rental agreement negotiated by the State, they are covered by an insurance policy provided by the car rental agency as a provision of the State contract. Employees who are involved in an accident while driving a State contract rental car must complete the Std. Form 270 and Std. Form 274.

When renting a vehicle for University or State business, do not change the rental agreement terms. A change in terms may not be covered under the insurance contract with the rental agency.

**No rental agreement will allow for use of 15 passenger vans.**

### 3.13.4 Use of Police Accident Reports

- Any designated manager who is investigating a University vehicle accident is an “interested party” and is entitled to read, and make notes from, police reports. Such reports will usually be on file within 48 hours at the office of the police agency that has jurisdiction over the place of the accident.
- For accidents occurring outside incorporated areas, contact the
  - California Highway Patrol; for those within cities, contact the local police department.
- Copies of University vehicle reports made by the Highway Patrol may also be obtained by written request to the California Highway Patrol, nearest to the accident scene. There is no charge for this service. If the investigating supervisor thinks it advisable, he/she may contact the investigating officer through the Highway Patrol Area Commander, or through the office in charge of the local police department traffic unit.

### 3.14 Motor Vehicle Liability Insurance

Vehicle Liability Self Insurance Claims Unit has been established within ORIM, to respond to claims of bodily injury and/or property damage of others, which occur during University use, operation or maintenance of self-propelled land vehicles. Evaluation and payment of claims will be made by ORIM following statutory provisions of Sections 17000 and 17001 of the California Vehicle Code and other laws applicable to claims against the State of California. This program protects any officer or employee of the University against all motor vehicle liability claims made by third parties while operating a vehicle in the course and scope of employment.

If a third party makes a claim for liability through the CSU Claim process, and it is determined that the claim is a vehicle liability claim (involving licensed or motorized equipment), then the Systemwide Office of Risk Management will submit the claim to ORIM and notify the campus.

The Vehicle Liability Self Insurance program is designed to provide reimbursement to third parties only (when an accident is the fault of the CSU driver). It is not designed to reimburse University employees.

**Note that ORIM limits auto liability coverage to $1,000,000 for accidents involving approved student and/or volunteer drivers.**

An employee’s personal automobile insurance policy is the primary coverage for liability and damages in the event of an accident while on University or State business under the following circumstances:

- The employee has failed to obtain a “non-availability” slip from the State contract rental vehicle agency before proceeding to a non-state contract rental agency.
- The employee has rented a vehicle from an agency other than the State vehicle contract agency
- The employee is driving his/her personal vehicle (whether or not a University or State vehicle was available). (Insurance Code 11580.9)

Claims paid by private insurance for accidents to privately owned vehicles while being operated on University or State business are not reimbursable from CSU funds. An employee may seek relief from out-of-pocket expenses such as deductibles via the CSU claims process. Information on how to file a claim with the CSU can be found at http://www.calstate.edu/risk_management/claims/ or through the campus risk manager.
ORIM has agreed to pursue the party responsible for the accident to recover the CSU’s costs of repairs. Copies of the repair invoices, and any other expenses, should be forwarded as soon as possible to their office at 707 Third Street, First Floor, West Sacramento, California 95605, Attn: Claims Manager.

Please refer to “Ok, You’ve Had a Motor Vehicle Accident in a Rent-a-Car, So Now What Happens?” hand-out

**3.15 Repairs and Warranties**

**3.15.1 Repairs to CSU Owned Vehicles**
Whenever possible, minor repair of CSU-owned vehicles will be performed in campus automotive service shops. The campus has the discretion to set the campus vehicle fleet manager’s approval requirement on repair estimates. It is recommended that where the parts costs exceed $1,000 or when replacement of the vehicle may be a consideration, that campus guidelines require campus vehicle fleet manager approval.

For commercially performed repairs the campus has the discretion to set the campus vehicle fleet manager’s approval requirement on repair estimates and the number of estimates to be obtained. It is advisable that when the cost of repair will be greater than $1,500, an attempt is made to obtain three estimates. (If three estimates are not obtainable, an explanation should be retained in the vehicle repair file.) Preferably, one of the estimates should be from an authorized dealer of the vehicle involved.

Adequate estimates must quote flat rates on labor for parts replacement and net prices on parts, when applicable, for comparable jobs or job elements. When parts are to be repaired or straightened rather than replaced, estimated time costs are acceptable. All costs must be itemized.

Each estimate will be submitted in triplicate to the campus vehicle fleet manager, who will make the award to the estimator who has included all the work required to repair the vehicle, not necessarily the lowest bidder. If hidden damage is found after the vehicle has been dismantled, the inspector may authorize any necessary supplementary cost.

The accepted estimate is distributed as follows:
- The original is attached to the invoice.
- One copy is retained in the campus vehicle repair file.
- In accident cases, a copy is furnished to ORIM.

**3.15.2 Warranty Inspection and Repairs**
All CSU-owned vehicles should be inspected for parts that show defects in material and/or workmanship in time to take full advantage of manufacturer’s warranty replacement provisions before their expiration. The Owner’s Manual supplied with each new vehicle contains the warranty coverage for that vehicle. The first 12,000-mile preventive maintenance service should be performed prior to expiration of warranty, i.e., before the speedometer has reached 12,000 miles or the vehicle has been in service one year, whichever comes first.

Manufacturers occasionally initiate changes during the model year to be applied retroactively. When notified of such changes, the campus shall ensure that they are made by the authorized dealer at no cost to the CSU.

**3.15.3 Operator Inspection**
The operator of a vehicle has an obligation to inspect the vehicle before driving it. The vehicle should be checked visually and the “Motor Vehicle Pre-Use Safety Checklist” completed to assure that such items as the tires are in good condition and adequately inflated, that the side-view mirror is usable, that there is a gas cap, spare tire, and a jack. The brakes, lights, and other controls should be tested for satisfactory performance. Suspected problems noticed by the operator while using the vehicle should be reported to the campus vehicle fleet manager and noted on a Motor Vehicle Pre-Use Safety Checklist, which should be kept in the vehicle.
4.0 Training

<table>
<thead>
<tr>
<th>Utility Vehicle</th>
<th>Equipment Operator</th>
<th>Sedan /SUV 6</th>
<th>8-12 Passenger Van</th>
<th>Personal Sedan/SUV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utility Cart, Golf Cart</td>
<td>Lawnmowers, or other riding equipment</td>
<td>Forklift, Aerial Lift, or other heavy equipment</td>
<td>6 Passengers including driver</td>
<td>8-12 passengers including driver</td>
</tr>
<tr>
<td>Specific equipment training certificate</td>
<td>Specific equipment training certificate</td>
<td>Specific equipment training certificate and operator card as applicable</td>
<td>(New employees must also submit a current DMV printout), along with an Employee Pull notice form on file.</td>
<td>(New employees must also submit a current DMV printout), along with an Employee Pull notice form on file.</td>
</tr>
<tr>
<td>Practical Skills assessment</td>
<td>Practical Skills assessment</td>
<td>Practical Skills assessment</td>
<td>Defensive Driver Training</td>
<td>Defensive Driver Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Basic First Aid</td>
<td>Basic First Aid</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Authorization to Use Privately Owned Vehicles on District Business form (to be renewed annually).</td>
<td>Large Capacity Van Operator Safety Training</td>
</tr>
</tbody>
</table>

5.0 Document Retention and Recordkeeping

<table>
<thead>
<tr>
<th>Version</th>
<th>Date Approved</th>
<th>Author</th>
<th>Revision Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>02/01/2017</td>
<td>Marianne Spotorno, CSP Dir. Safety &amp; Risk</td>
<td>New Program</td>
</tr>
</tbody>
</table>
Appendix A: Definitions

Approved Training
A certificate or equivalent document issued by a training organization that meets the regulatory standards for certification.

Authorized person/user:
A person approved or assigned by the employer to perform a specific type of duty or duties or to be at a specific location or locations at the University.

Competent person
One who is capable of identifying existing and predictable hazards in the surroundings or working conditions which are unsanitary, hazardous, or dangerous to employees, and who has authorization to take prompt corrective measures to eliminate them.

Certified
One who is officially recognize as possessing specific qualifications or meeting specific regulatory standards by means of demonstrative knowledge, skills and abilities and possessing a valid proof of competency card or other certificate from an approved source.

Driver’s License
A permit as one issued by a state’s motor vehicle bureau, that allows the holder to drive a motor vehicle on public roads.

Qualified Person:
One who, by possession of a recognized degree, certificate, or professional standing, or who by extensive knowledge, training, and experience, has successfully demonstrated his ability to solve or resolve problems relating to the subject matter, the work, or the project at the University.

Shall:
Means mandatory

Should:
Means recommended
Appendix B: Safe Vehicle Positioning

SAFE VEHICLE POSITIONING/BACKING PROCEDURE

Complete JSA Before Positioning Vehicle

Is Backing/Positioning Necessary?

Yes

Stop Vehicle - Perform “Walk Around” to Identify Potential Obstacles

No

Is Spotter Available?

Yes

Conduct Safety Tailgate w/ Spotter Prior to Spotting

No

Set Cone Markers at Safe Distance Between Vehicle and Obstacle(s)

Back/Position Equipment to Cone Markers

Vehicle Positioned to Desired Location?

Yes

Continue Work in Safe Manner

No

Stop & Reposition Cone Markers at Safe Location

Spotter in View?

Yes

Vehicle Positioned to Desired Location?

Yes

Stop Positioning/Backing and Reposition Spotter

No

Position Spotter to Provide Positioning/Backing Guidance

Proceed With Vehicle Positioning/Backing

No

No

Stop Vehicle - Perform “Walk Around” to Identify Potential Obstacles
Appendix C: Pre Use Inspection Tag Sample

Download form at SRM webpage

**MOTOR VEHICLE DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tires &amp; Wheels Properly Inflated, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel/Batteries &amp; Water Levels Good</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horn Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat Belts All Functioning Properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat(s) In Good Condition Free From Excess Wear/Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering &amp; Brakes Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gauge Warning Lights Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Fluid: Oil, Coolant or Fuel Leaks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lights: (Head, Tail, Turn, Brake) All Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windshield &amp; Mirrors Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windshield Wipers &amp; Filled Good</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior Cab Free From Excess Debris or Loose Materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vehicle Registration/Insurance Card</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Aid Kit / Roadside Emergency Kit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior Condition Good</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date: 

**UTILITY OR GOLF CART DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tires &amp; Wheels Properly Inflated, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel/Batteries &amp; Water Levels Good</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horn Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat Belts All Functioning Properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat(s) In Good Condition Free From Excess Wear/Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering &amp; Brakes Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gauge Warning Lights Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Fluid: Oil, Coolant or Fuel Leaks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lights: (Head, Tail, Turn, Brake) All Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windshield &amp; Mirrors Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior Cab Free From Excess Debris or Loose Materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Load Handling Attachments All Functional, Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labels/Placards/Owners Manual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural Members Not Cracked, Bent or Broken</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior Condition Good</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date: 

**AERIAL LIFT DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency controls in proper working condition? (EMO button or Emergency Stop Device and emergency lowering function)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Platform controls interlock mechanisms are functional? (i.e. foot pedal, spring lock, or hand controls, brent for height to move lift, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All controls function properly and are labeled? (up, down, right, left, forward, back, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower operating controls successfully over-ride the upper controls?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Both upper and lower controls are adequately protected from inadvertent operation?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stabilizers, outriggers, and/or extending arms function properly?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All switch &amp; mechanical guards are in good condition and properly installed?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Safety Indicator lights work properly and motion alarms are functional?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All guards/h are sound and in place, including basket chain/cover?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work platform &amp; extension sides are clean, dry, &amp; clear of debris and move freely with safety latching pins in place to lock setting on models with extension platforms?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire extinguisher on platform?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No defects such as cracked seats, fuel leaks, hydraulic leaks, damaged control cables or wire harness, etc.?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tires, wheels, lug nuts in good condition, with adequate air pressure if pneumatics?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer’s decals are in place and legible?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Braking devices are operating properly?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The manufacturer’s operations manual is stored on the lift (in all languages of the operators)?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date: 

**FORKLIFT LIFT DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tires &amp; Wheels Properly Inflated, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel/Batteries, Caps and Restraint System Adjusted and Fastened</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horn &amp; Reverse Alarm Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mast Chains, Cables &amp; Stops, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forks &amp; Other Attachments Operational, Retaining Pin &amp; Heel in Good Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seatbelt Functioning Properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat in Good Condition Free From Excess Wear/Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hoses/Belts/Pulleys Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hydraulic Oils &amp; Coolant at Proper Level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lift Guards in Good Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior Cab Free From Excess Debris or Loose Materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior Condition Good</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date: 

**FORKLIFT LIFT DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tires &amp; Wheels Properly Inflated, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel/Batteries &amp; Water Levels Good</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horn Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat Belts All Functioning Properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat(s) In Good Condition Free From Excess Wear/Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering &amp; Brakes Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gauge Warning Lights Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Fluid: Oil, Coolant or Fuel Leaks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lights: (Head, Tail, Turn, Brake) All Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windshield &amp; Mirrors Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Load Handling Attachments All Functional, Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior Cab Free From Excess Debris or Loose Materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Load Handling Attachments All Functional, Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labels/Placards/Owners Manual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural Members Not Cracked, Bent or Broken</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior Condition Good</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date: 

**FORKLIFT LIFT DAILY PRE USE SAFETY CHECK**

<table>
<thead>
<tr>
<th>Vehicle Make/Model</th>
<th>Dept.</th>
<th>Unit #</th>
</tr>
</thead>
</table>

**Inspect Unit Carefully Before Operating**

<table>
<thead>
<tr>
<th>Item</th>
<th>Checked And Or</th>
<th>May Require Attention</th>
<th>Requires Immediate Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tires &amp; Wheels Properly Inflated, No Visible Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel/Batteries &amp; Water Levels Good</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horn Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat Belts All Functioning Properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seat(s) In Good Condition Free From Excess Wear/Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering &amp; Brakes Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gauge Warning Lights Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Fluid: Oil, Coolant or Fuel Leaks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lights: (Head, Tail, Turn, Brake) All Operational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windshield &amp; Mirrors Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Load Handling Attachments All Functional, Free From Damage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labels/Placards/Owners Manual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural Members Not Cracked, Bent or Broken</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior Condition Good</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Inspected by: 

Date:
Appendix D: Forklift Operations

Download form at SRM webpage

IIPP Quick Guide: Forklift Operations

Fork Lift / Industrial Truck Safety Operating Rules

Only operators authorized by the University and trained in the safe operations of industrial trucks, industrial tow tractors or similar equipment shall be permitted to operate such vehicles. All operator training and evaluation shall be conducted by persons who have the knowledge, training, and experience to train operators and evaluate their competence BCCR, Section 3668(b)(4). The Department of Safety & Risk Management (SRM) provides detailed training materials and guidelines for training. The instructor-led course and evaluation introduces operators to forklift design, necessary safety precautions, and the basic principles of safe operation.

Introduction

Forklift safety certification is required safety training for all employees and student who operate a forklift. Supervisors directly responsible for forklifts used within their departments must ensure that only trained and certified individuals operate equipment. All authorized operators must carry their valid operator card with them during the operation of the equipment. Certification must be renewed every three years.

Operator Training

Training shall consist of a combination of formal instruction (e.g., lecture, discussion, interactive computer learning, video, written material), practical training (demonstrations performed by the trainer and practical exercises performed by trainees) and evaluation of the operator's performance in the workplace BCCR, Section 3668(b)(5).

Refresher Training

Refresher training including an evaluation of the effectiveness of that training, shall be conducted to ensure that the operator has the knowledge and skills to operate the forklift truck safely as follows: Refresher training in relevant topics shall be provided to the operator when:
- The operator has been observed to operate the vehicle in an unsafe manner;
- The operator has been involved in an accident or near-miss incident;
- The operator has received a warning that reveals that the operator is not operating the truck safely;
- The operator is assigned to drive a different type of truck, or a condition in the workplace changes in a manner that could affect safe operation of the truck.

An evaluation of each powered industrial truck operator's performance shall be conducted at least once every three years BCCR, Section 3668(d).

Note: All Operators who are observed operating unsafely and/or involved in a near miss or incident, regardless of magnitude will be required to complete refresher training prior to being permitted to continue to operate.

Certification

After the completion of instruction and training: Submit a copy of the “Certification of Completion” to SRM. SRM will process employee as having completed Forklift Safety Certification. SRM will send an email indicating successful completion along with an Operator certificate.

Initial Training

Video Instruction

Review one DVD: Forklift Basics.
Classroom Exercise: Cal-OSHA Operating Rules for Industrial Trucks [8 CCR, General Industrial Safety Orders 3550(t)].

1. Classroom Exercise: Identify Forklift Main Parts
2. Classroom Review: Departmental forklift instruction and overview
   Instructor shall review specific instruction on the forklift(s) employee(s) will be required to operate.
   Note: Because powered industrial trucks are manufactured by different companies with various models available, the training must be specific to the operating characteristics of the specific powered industrial truck the employee will be using.
3. Classroom Review: Departmental workplace-related instruction and overview
   Instructor shall review specific workplace-related hazards and departmental policies.
4. Classroom Exercise: Forklift Safety Quiz
   Review and complete the “Forklift Safety Quiz”. Upon completion, instructor should review the quiz with the class.
5. Pre-Shift Inspection
   Instructor shall review departmental pre-shift inspection procedures and checklist.
   Instructor shall perform a demonstration pre-shift inspection using departmental procedures and checklist.
6. Practical Driving Evaluation
   All designated operators must demonstrate the ability to perform the following operations:
   - Pre-operation inspection: posting of rated capacity, tires, horn, lights, seatbelts, any evidence of leaking fluids or other mechanical problems
   - Controls inspection: operation of brakes and parking brakes, steering, proper function of pedals and controls
   - Proper control of the vehicle when performing normal functions as determined by the department, including moving and repositioning of a load. Attention shall be given to proper starting, stopping, and turning, positioning of the load on the forks, clearance between the load, the vehicle and any potential obstacles.
7. Certification of Completion
   The classroom training instructor, practical driving evaluator, and employee must completely fill out the attached “Forklift Training Certification of Completion” form. Send a copy of the completed and signed form to SRM the original must be kept on file for a minimum of three years by the department. Upon review and verification SRM will process employee as having completed Forklift Safety Certification. SRM will send an email indicating successful completion along with certification.
Appendix D: Pre Trip Safety Plan

Download form at SRM webpage

Safe Golf Cart Operation Guidelines

Environmental Health & Safety (EHS) has developed these guidelines to assist the Cal Maritime campus community in complying with the campus golf cart policy. For the purpose of the guidelines, the term "golf cart vehicles" will be used to encompass golf cars, gators, and other similar utility vehicles. EHS recommends that each department develop written procedures to authorize and train its employees who operate golf cart vehicles. All drivers must possess a valid driver’s license.

As stated in the policy, Cal Maritime owned golf cart vehicles are to be used for official business only. Personally owned golf cart vehicles may not be operated on Cal Maritime property, unless written approval has been obtained from Administrative Services.

Inspection and Maintenance:
- All golf cart vehicles should be maintained as recommended by the manufacturer’s service schedule. A vehicle inspection should be conducted each day of use. A checklist should be developed for each golf cart vehicle to include items such as: tire pressure, rust damage, fluid leaks, loose parts, and other obvious visual issues. Following a visual inspection, the functional aspects of the golf cart vehicle safety devices should be checked, such as: steering, brakes, mirrors, wipers, seat belt, horn, signals and correctly charged battery. Refer to the owners’ manual for other inspection and maintenance recommendations.
- Note: Proper battery maintenance is very important. Older batteries have been known to explode due to overcharging. Refer to owner’s manual for correct charging procedures.
- Tampering or modifying the golf cart vehicle’s governor is prohibited.
- Resort any items not in proper working order to your supervisor and take the golf cart vehicle out of service until repairs are made. Keep records of all maintenance and repairs.

Safety Equipment:
- Carts must be four-wheeled vehicles.
- All original safety feature equipment must be kept in good working order.
- All carts and trailers (pulled by carts) must have clearly displayed on the exterior of the cart and trailer the slow moving vehicle reflective triangle.
- Carts should have a windshield and roof covering to provide minimum protection to the driver.

Parking:
- Park carts on hard, covered surfaces such as asphalt and concrete.
- Never park in heavily traveled pedestrian areas.
- DO NOT block fire lanes, entrances to buildings, stairways, disability ramps, main thoroughfares, or fire suppression equipment.

Supervisors are Responsible for:
- Ensuring employee drivers are properly licensed and that they have completed the mandated safety program prior to operating a cart.
- Taking timely action to correct employee infractions in the operation of the cart (may be remedial training or discipline)
- Ensure that all equipment on the cart is working properly and that the cart is taken out of service when there are deficiencies that could contribute to an unsafe condition.

Employees are Responsible for:
- Inspecting the vehicle before operation and documenting any deficiencies.
- Attending a safety program prior to operating a cart.
- Operating the vehicle in a safe manner.
- Reporting accidents to his or her immediate supervisor.

Safety Rules for Drivers Operating Carts:
- Operators must possess a valid state driver's license.
- All operators must attend golf cart safety training.
- Golf carts are not registered vehicles and will not be driven on city streets.
- Maximum speed of 15 mph, under safe, clear road conditions.
- DO NOT exceed the maximum safe occupancy (Seating provided for 2-4 passengers)
- No modification will be made to golf carts without the approval of the manufacturer.
- Pedestrians have the right-of-way in facilities. Carts must yield to pedestrians on sidewalks or walkways.
- SPEED IS TO BE REDUCED TO A MINIMUM WHEN DRIVING ALONG OR CROSSING SIDEWALKS SO AS TO AVOID ACCIDENTS WITH PEDESTRIANS.
- Vehicles must be equipped with head and tail lights to be operated during the night.
- DO NOT attempt to pass another cart which is in motion.
- Set the parking brake and turn the wheels when not in transit.
### Appendix D: Pre Trip Safety Plan

**Download form at SRM webpage**

#### PRE-TRIP SAFETY PLAN WORKSHEET

<table>
<thead>
<tr>
<th>N</th>
<th>CAL MARITIME</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>University Vehicle Safe Operator Program</strong></td>
<td></td>
</tr>
<tr>
<td><strong>California State University Maritime Academy</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Safety &amp; Risk Management</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Injury Illness Prevention Program</strong></td>
<td></td>
</tr>
</tbody>
</table>
| **Document #** | 09-
| **Revision:** | 04026
| **Page** | 26 of 34

**Appendix D:** Pre Trip Safety Plan

**Target Audience:**
- University Vehicle Safe Operator Program
- California State University Maritime Academy
- Safety & Risk Management
- Injury Illness Prevention Program

#### HAZARD IDENTIFICATION:

<table>
<thead>
<tr>
<th>Hazards Identified in Work Area</th>
<th>Hazard Source</th>
<th>Hazard Source (e.g., equipment, environment, process)</th>
</tr>
</thead>
</table>

#### HAZARD EVALUATION:

<table>
<thead>
<tr>
<th>Hazard</th>
<th>Probability</th>
<th>Severity</th>
</tr>
</thead>
</table>

#### HAZARD CONTROL METHODS & TIPS:

<table>
<thead>
<tr>
<th>Control Method</th>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### LIST ALL THE ACTIVITIES/TASKS

1. Name of Activity/Task
2. Description
3. Responsibility

#### IDENTITY ALL SPECIFIC HAZARDS:

1. Name of Hazard
2. Source
3. Exposure
4. Control

#### HOW WILL YOU CONTROL THE HAZARDS:

1. Control Method
2. Tips
3. Responsible Party
4. Date Completed

#### EMERGENCY RESPONSE:

1. Emergency Contact: 911
2. Location: On-Site
3. Equipment: Walkie-Talkie
4. Supplies: First Aid Kit

#### PRIMARY EVACUATION-ASSEMBLY POINT:

1. Location: Inside Building
2. Equipment: Fire Extinguishers
3. Supplies: First Aid Kit

#### ADDITIONAL INFORMATION/NOTES:

- Faculty/Staff Complete Travel Authorization Form
- Complete Participant List, w/Emergency Contact Inf
- **International Travelers**
- Complete Participant List, w/Emergency Contact Inf
- Email to Foreign Travel Insurance Program
- Personal Medications & Doctor’s Referral Information
- Passport

#### GEAR BAG/PRE DEPARTURE/TRAIP SAFETY PLAN:

- Be aware of your surroundings
- Communications
- Personal Effects
- Vehicle Emergency Kit Safety
- Evaluation
- Station in Place
- Weather
- Safe Travel Devices
- Type of Conduct

#### PRE-DEPARTURE/PARTICIPANT ACKNOWLEDGMENT:

1. PRINT NAME
2. SIGN NAME
3. PRINT NAME
4. SIGN NAME
5. PRINT NAME
6. SIGN NAME
7. PRINT NAME
8. SIGN NAME
9. PRINT NAME
10. SIGN NAME
### Appendix E: Group Participant List

**Download form at SRM webpage**

<table>
<thead>
<tr>
<th>Participant</th>
<th>Age Under 18</th>
<th>Participants List</th>
<th>Student or Employee ID #</th>
<th>Participant Email</th>
<th>Emergency Contact Person</th>
<th>Relationship</th>
<th>Primary Contact #</th>
<th>Secondary Contact #</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*If participant is under 18 years old, please provide age next to their name.
*Participant Status: Select from the drop down list.
Appendix F: STD Form 261 Authorization to Use Privately Owned Vehicle

This form can be electronically completed and is located: Download form at SRM webpage
Appendix G STD Form 269 Accident Identification Card

Download form at SRM webpage
### Appendix H: STD Form 270 Vehicle Accident Report

This form can be electronically completed and is located: [Download form at SRM webpage](#)

---

#### STATE OF CALIFORNIA, DGS CRM

**VEHICLE ACCIDENT REPORT**

<table>
<thead>
<tr>
<th>STATE DRIVER</th>
<th>AGE</th>
<th>EMPLOYING DEPARTMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRIVER'S LICENSE NO.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCIDENT DATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TIME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OFFICE ADDRESS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AGENCY DOCUMENT NO. (Optional)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WAS VEHICLE BEING USED ON OFFICIAL STATE BUSINESS (Enter exact description)</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>DATE DRIVER LAST COMPLETED DRIVER TRAINING</td>
<td>Month/Year</td>
<td>NOT TAKEN</td>
</tr>
<tr>
<td>JOB TITLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUSINESS TELEPHONE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### VEHICLE

<table>
<thead>
<tr>
<th>VEHICLE LICENSE NUMBER</th>
<th>VEHICLE YEAR, MAKE, MODEL</th>
<th>DEPARTMENT OWNED</th>
<th>DGS POOL</th>
<th>RENTAL</th>
<th>EMPLOYEE OWNED</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LENS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DAMAGE TO STATE VEHICLE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### ACCIDENT LOCATION

- Accident Location (Address, City, State, Zip Code)
- Road Conditions
- Weather Conditions
- Traffic Conditions
- How fast were you driving?
- Est. Speed of other car

#### POLICE REPORT MADE

- Yes
- No

#### OTHER VEHICLE

- Briefly describe damages to other vehicle or property
- Name and address of other party's insurance

---

####rites Name

- Name
- Age
- Address

#### HOSPITAL

- Name
- Address

#### TELEPHONE

- Name
- Address

#### ADDRESS

- Name
- Address

---

(Continue on reverse)
Appendix I: STD Form 274 State Driver Accident Review

This form can be electronically completed and is located: [Download form at SRM webpage](#)

```
STATE OF CALIFORNIA - GENERAL SERVICES - RISK AND INSURANCE MANAGEMENT

STATE DRIVER ACCIDENT REVIEW
STD. 274 (REV. 1/2003)

SUPERVISOR'S REVIEW - FOR DEPARTMENTAL ACCIDENT PREVENTION

PURPOSE: To have supervisor investigate each driver accident, report facts and circumstances, confirm that the State vehicle was used on State business, and initiate or recommend action to achieve accident prevention.

HOW: Use sources of information listed on the back of this form. Report on all accidents, regardless of who was hurt, what property was damaged, or who was responsible. (SAM 2430)

WHO: SUPERVISOR who authorized the employee to drive on State business must prepare this report, code the type of accident, and forward it to the reviewing officer/safety coordinator within five days from the date of the accident. Attach STD. 274 to the departmental copies of STD. 270 (if applicable). If STD. 270 is not required, send a copy of STD. 274 to the Office of Risk and Insurance Management, Health and Safety Unit.

REVIEWING OFFICER: You are responsible for the quality (accuracy and completeness) of the supervisor's report and to initiate follow-up action.

1. DRIVER'S NAME
2. ORGANIZATION UNIT AND DEPARTMENT
3. DATE OF ACCIDENT

4. HOW DID ACCIDENT OCCUR?

5. WHAT DRIVING RULES, VEHICLE LAWS OR VIOLATIONS CONTRIBUTED TO THE CAUSE OF THE ACCIDENT?

6. SUPERVISOR'S ACTION TAKEN, OR RECOMMENDATION FOR SUPERIORS TO PUT INTO EFFECT. (SEE BACK FOR SUGGESTIONS)

7. SIGNATURE AND TITLE OF SUPERVISOR

     DATE

8. REVIEWING OFFICER

     I CONCUR [ ] OR I DO NOT CONCUR [ ] WITH SUPERVISOR

     MY EVALUATION AND ACTION TAKEN:

     DATE

9. HOW WAS THE DRIVER INFORMED OF YOUR EVALUATION AND FOLLOW-UP ACTION:

     VERBAL DISCUSSION [ ] WRITTEN MEMO [ ] VERBAL AND WRITTEN [ ]

     DATE

10. SIGNATURE AND TITLE OF REVIEWER

     DATE
```
STATE DRIVER ACCIDENT REVIEW

SOURCES OF INFORMATION INVESTIGATED BY SUPERVISOR
IN ADDITION TO STD. 270 PREPARED BY DRIVER

DID YOU?

☑ QUESTION STATE DRIVER
☑ GO TO SCENE OF ACCIDENT
☑ CLOSELY EXAMINE SEAT BELTS AND SAFETY EQUIPMENT
☑ EXAMINE MECHANICAL DEFECTS
☑ READ POLICE REPORT AND CITATIONS
☑ REVIEW DL-254, ABSTRACT OF LICENSE RECORDS
☑ DEPARTMENT OF MOTOR VEHICLES
☑ REVIEW DRIVER’S FILE – DEPARTMENT RECORDS
☑ ASK ABOUT ANY DISTRACTIONS OR ATTENTION
☑ DIVERSIFIERS, PRIOR TO ACCIDENT (i.e., cellphone, eating,
☑ (racing, talking)
☑ CONSIDER, WAS OUR DRIVER INFLUENCED BY
☑ FATIGUE, ILLNESS, MEDICINE OR ALCOHOL?
☑ IF YES, EXPLAIN

GIVE DATE OF DEFENSIVE DRIVER TRAINING
☑ ORIENTATION - DEPARTMENT POLICIES AND
☑ RULES
☑ CLASSROOM DEFENSIVE DRIVER TRAINING
☑ BEHIND-THE-WHEEL TRAINING
☑ SPECIAL MOBILE EQUIPMENT TRAINING

SOME ACTION SUGGESTIONS AND RECOMMENDATIONS
(Explain on other side)

☐ DRIVER HABITS NEED TO BE OBSERVED IN TRAFFIC
☐ OUR DRIVER WAS A CONTRIBUTING FACTOR
☐ (memo to driver)
☐ FURTHER TRAINING BE PROVIDED
☐ (when, by whom and type)
☐ DEPARTMENTAL POLICY OR LOCAL RULES BE MODIFIED
☐ DRIVER BE DISCIPLINED (special action suggested)
☐ ASK ACCIDENT REVIEW BOARD TO ADVISE
☐ SUPERVISOR
☐ NO FURTHER PERSONNEL ACTION BE TAKEN
☐ RECOMMEND REMOVAL FROM DRIVING STATUS
☐ DISCUSS CUMULATIVE DRIVER RECORD
☐ RECOMMEND NEW OR CHANGE OF TRAFFIC FLOW
☐ CHANGE OR IMPROVE EQUIPMENT
☐ ASK FOR EXPERT CONSULTATION

SUPERVISOR – CLASSIFY FOR DEPARTMENTAL REPORTING

TYPE OF VEHICLE ACCIDENT:

COLLISION WITH OTHER VEHICLE

☐ 1. Evasive maneuver
☐ 2. Lost control
☐ 3. Hit other vehicle in rear
☐ 4. Hit from rear
☐ 5. Proceeding straight
☐ 6. Crossed into opposing lanes
☐ 7. Changing lanes
☐ 8. Making right turn
☐ 9. Making left turn
☐ 10. Backing
☐ 11. Mechanical failure
☐ 12. Collision with bicycle

SOLO ACCIDENT

☐ 13. Evasive maneuver
☐ 14. Lost control
☐ 15. Collided with stationary object
☐ 16. Backing
☐ 17. Runaway vehicle
☐ 18. Lost load
☐ 19. Mechanical failure
☐ 20. Struck or was struck by animal

STRIking PEDESTRIAN

☐ 21. In a crosswalk
☐ 22. Not in a crosswalk
☐ 23. White backing

MISCELLANEOUS ACCIDENT

☐ 24. Explain

WAS ACCIDENT PREVENTABLE BY STATE DRIVER?

☐ Yes
☐ No
Appendix J: You have had an Accident, Now What?

**Well, that depends on who you are and when we’re talking about.** Hopefully, the following will help explain “Who’s On First.”

- **You are the state driver and it is immediately following the accident.**
  - At the accident scene, **do not admit fault or make any promises** that the state will pay for any damages. Using the Std 269 card that should be in your glove compartment, write down as much information as you can. Tear off the perforated part and give it to the other driver so he/she will know who you are and how to contact us.
  - **If there were injuries to non-state parties, or if the other party suffered significant property damage,** report the accident to the Office of Risk and Insurance Management (ORIM) by telephone at (916) 376-5302. Complete the Std 270 as soon as possible. Have your supervisor or safety coordinator review the Std 270 and **sign it.**
  - Immediately **FAX** a copy of the accident report (signed by employee and supervisor/safety coordinator) to the ORIM at 916-376-5277.
  - **The original Std 270 must be mailed to the ORIM within 48 hours following the accident.**
  - **If you are contacted by the other driver, their insurance company or their attorney,** give the caller no written nor recorded statements and refer them to the ORIM.

- **You are the state driver’s immediate supervisor or safety coordinator.**
  - Review and co-sign the Vehicle Accident Report (Std 270) to attest to the fact that the employee was on official state business.
  - Investigate the accident to determine if it was preventable.
  - Complete the Supervisor’s Review of Motor Vehicle Accident (Std 274).
  - Mail Std 274 to the ORIM at the following address:  
    - Claims Unit 707 Third Street, First Floor, West Sacramento, CA 95605

- **Whoever you are, if contacted by the claimant, it’s OK to tell them the following:**
  - The ORIM handles and makes all the decisions on accident claims. (“All I do is report them to Sacramento”.) **Make neither promises nor commitments to the claimants that their claim will be paid!**
  - **Refer claimants directly to the ORIM** (916-376-5302 or 1-800-900-3634) to expedite the handling of their claim.
  - If claimant wishes to protect themselves from the six-month claim-filing statute of limitations, they **may also** file a formal claim against the CSU. Information on how to file a claim with the CSU can be found at: [http://www.calstate.edu/risk_management/claims/](http://www.calstate.edu/risk_management/claims/) or through the campus risk manager. The claim form must be completed and **submitted prior to six months after the accident.**
  - In order to substantiate and document their property damage claim, **the claimant must provide the ORIM with a written estimate(s) as follows:**
    - One estimate if the repairs are less than $500
    - Two estimates if the repairs are more than $500
  - **If the claimant says that the “Motorists’ Bill of Rights” says they are only required to submit one estimate, tell them that is true, but only when one is dealing with his/her own insurance company.**
  - **If the claimant’s car is not drivable, obviously they cannot obtain competitive repair estimates. The ORIM will handle this situation.**
  - The claimant may **elect** to have their own insurance company repair the damage if they have collision coverage. Their insurance company can then press their claim against the State and reimburse them. This is an option which is generally faster than making a claim against the State directly.
  - **If the claim is only for property damage, the claimant’s vehicle is drivable,** and they are willing to allow you to delay forwarding the Std 270 to the ORIM by a couple days (only) to allow them time to obtain and give you one or two repair estimates, you can then wait to send in the Std 270 until you can attach the repair estimates to it. This approach, to be used **only with a cooperative claimant,** enables our office to obtain the entire package together at one time.
  - **You are the state driver, and you have been served with a Small Claims Court summons and complaint.**
    - You will have to appear as ordered. The University General Counsel, ORIM, the Attorney General’s Office and/or Caltrans’ Legal Division cannot appear either with or on your behalf in Small Claims Court.
    - Notify Campus Counsel & Risk Management. You should contact the ORIM to advise them. Campus Counsel and/or ORIM and they may be able to provide you with copies of documents as well as provide advice on how to proceed to defend yourself and your employer. We recommend that you take your supervisor or safety coordinator along with you to the trial.
  - **When you receive the verdict or judgment (usually by mail), call Campus Counsel and ORIM promptly to advise of the results. You are the state driver, and you have been served with a Municipal or Superior Court summons and complaint.**
  - **Call Campus Counsel, Risk Management and ORIM immediately.** An answer must be filed within 30 days of service to avoid a default judgment, so do not delay in reporting. If the above does not answer your particular question or address your situation, please contact Campus Counsel, Risk Management or call the ORIM at (916) 376-5302.

**OK, YOU’VE HAD A MOTOR VEHICLE ACCIDENT IN A RENT-A-CAR VEHICLE, SO NOW WHAT HAPPENS?**

The Office of Fleet Administration negotiates with rental car companies each year. A list of the selected vendors and contract provisions may be found at [www.ofa/services/CarRental.asp](http://www.ofa/services/CarRental.asp).

When vehicles are rented under the terms of these negotiated contracts there is no need to purchase ANY insurance as part of the rental contract. Rental car companies are responsible for any damage sustained to vehicles as well as any damages we cause third parties as a result of negligent operation of the vehicle, (up to $500,000 for any one accident). **Use of the negotiated contracts is highly encouraged.** For the contract terms to apply, State identification must be presented to the rental car company at the time the vehicle is rented. Please note that claims related to rental vehicles goes through the State Office of Risk Management who holds the agreement with the approved Rental agencies.

In addition to following the procedure pursuant to Appendix A-7 – “Ok, You’ve Had a Motor Vehicle Accident, So Now What Happens?” please note the following:

- Report the loss immediately to the rental car agency. The contact information should be located on the rental agreement. If after reporting the accident to the rental agency you are contacted by the rental agency, please refer them to the State Office of Risk Management. The State Office of Risk Management handles and makes all the decisions on accident claims. **Make no promises or commitments to the Rental Car agency.**
- **Refer claimants directly to the State Office of Risk Management** (916-376-5302 or 1-800-900-3634) to expedite the handling of their claim.
- **Report the loss to your campus Risk Manager.**