

COMPETENCY-BASED OCCUPATIONAL FRAMEWORK FOR REGISTERED APPRENTICESHIP

Heavy and Tractor Trailer Truck Driver

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ABOUT THE URBAN INSTITUTE

The nonprofit Urban Institute is dedicated to elevating the debate on social and economic policy. For nearly five decades, Urban scholars have conducted research and offered evidence-based solutions that improve lives and strengthen communities across a rapidly urbanizing world. Their objective research helps expand opportunities for all, reduce hardship among the most vulnerable, and strengthen the effectiveness of the public sector.

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Competency-Based Occupational Frameworks

The Urban Institute, under contract by the U.S. Department of Labor, has worked with employers, subject matter experts, labor unions, trade associations, credentialing organizations and academics to develop Competency-Based Occupational Frameworks (CBOF) for Registered Apprenticeship programs. These frameworks defined the **purpose** of an occupation, the **job functions** that are carried out to fulfill that purpose, the **competencies** that enable the apprentice to execute those job functions well, and the **performance criteria** that define the specific knowledge, skills and personal attributes associated with high performance in the workplace. This organizational hierarchy – Job Purpose – Job Functions – Competencies – Performance Criteria – is designed to illustrate that performing work well requires more than just acquiring discrete knowledge elements or developing a series of manual skills. To perform a job well, the employee must be able to assimilate knowledge and skills learned in various settings, recall and apply that information to the present situation, and carry out work activities using sound professional judgement, demonstrating an appropriate attitude or disposition, and achieving a level of speed and accuracy necessary to meet the employer’s business need.

The table below compares the terminology of Functional Analysis with that of traditional Occupational Task Analysis to illustrate the important similarities and differences. While both identify the key technical elements of an occupation, Functional Analysis includes the identification of behaviors, attributes and characteristics of workers necessary to meet an employer’s expectations.

Framework Terminology	Traditional Task Analysis Terminology
Job Function – the work activities that are carried out to fulfill the job purpose	Job Duties – roles and responsibilities associated with an occupation
Competency – the actions an individual takes and the attitudes he/she displays to complete those activities	Task – a unit of work or set of activities needed to produce some result
Performance Criteria – the specific knowledge, skills, dispositions, attributes, speed and accuracy associated with meeting the employer’s expectations	Sub Task – the independent actions taken to perform a unit of work or a work activity

Although designed for use in competency-based apprenticeship, these Competency-Based Occupational Frameworks also support time-based apprenticeship by defining more clearly and precisely apprentice is expected to learn and do during the allocated time-period.

CBOFs are comprehensive in to encompass the full range of jobs that may be performed by individuals in the same occupation. As employers or sponsors develop their individual apprenticeship programs, they can extract from or add to the framework to meet their unique organizational needs.

Components of the Competency-Based Occupational Framework

Occupational Overview: This section of the framework provides a description of the occupation including its purpose, the setting in which the job is performed and unique features of the occupation.

Work Process Schedule: This section includes the job functions and competencies that would likely be included in an apprenticeship sponsor’s application for registration. These frameworks provide a point of reference that has already been vetted by industry leaders so sponsors can develop new programs knowing that they will meet or exceed the consensus expectations of peers. Sponsors maintain the ability to customize their programs to meet their unique needs, but omission of a significant number of job functions or competencies should raise questions about whether or not the program has correctly identified the occupation of interest.

Cross-cutting Competencies: These competencies are common among all workers, and focus on the underlying knowledge, attitudes, personal attributes and interpersonal skills that are important regardless of the occupation. That said, while these competencies are important to all occupations, the relative importance of some versus is others may change from one occupation to the next. These relative differences are illustrated in this part of the CBOF and can be used to design pre-apprenticeship programs or design effective screening tools when recruiting apprentices to the program.

Detailed Job Function Analysis: This portion of the framework includes considerable detail and is designed to support curriculum designers and trainers in developing and administering the program. There is considerable detail in this section, which may be confusing to those seeking a more succinct, higher-level view of the program. For this reason, we recommend that the Work Process Schedule be the focus of program planning activities, leaving the detailed job function analysis sections to instructional designers as they engage in their development work.

- a. **Related Technical Instruction:** Under each job function appears a list of foundational knowledge, skills, tools and technologies that would likely be taught in the classroom to enable the apprentice’s on-the-job training safety and success.

- b. Performance Criteria: Under each competency, we provide recommended performance criteria that could be used to differentiate between minimally, moderately and highly competent apprentices. These performance criteria are generally skills-based rather than knowledge-based, but may also include dispositional and behavioral competencies.

Using the Competency-Based Occupational Framework to Develop a Registered Apprenticeship Program

When developing a registered apprenticeship program, the Work Process Schedule included in this CBOF provides an overview of the job functions and competencies an expert peer group deemed to be important to this occupation. The Work Process Schedule in this document can be used directly, or modified and used to describe your program content and design as part of your registration application.

When designing the curriculum to support the apprenticeship program – including on the job training and related technical instruction – the more detailed information in Section 5 could be helpful. These more detailed job function documents include recommendations for the key knowledge and skill elements that might be included in the classroom instruction designed to support a given job function, and the performance criteria provided under each competency could be helpful to trainers and mentors in evaluating apprentice performance and insuring inter-rater reliability when multiple mentors are involved.

Heavy and Tractor Trailer Truck Driver Occupational Overview

Occupational Purpose and Context

Safe transportation and delivery of goods; supply chain support; economic productivity. Individuals may be employed by large or small companies or may be self-employed. Jobs often require extensive travel and individuals must be able to work independently and autonomously. Heavy and Tractor Trailer Truck Drivers must be able to handle a great deal of responsibility, both for the safe transport of products and the safety of others on the roads or in adjacent communities.

Potential Job Titles

Delivery Driver, Driver, Line Haul Driver, Log Truck Driver, Over the Road Driver, Production Truck Driver, Road Driver, Semi Truck Driver, Tractor Trailer Operator, Truck Driver

Attitudes and Behaviors

Dependable, conscientious, and detail-oriented; must be able to work independently and stay on deadline; must have quick reaction time, good hearing and vision, and be able to predict potential hazards in order to avoid them. Must have good spatial orientation, problem sensitivity, the ability to apply rules to a variety of situations and good multi-limb coordination. In many cases, must have good static strength – the ability to lift, push, pull or carry objects.

Apprenticeship Prerequisites

Commercial Driver's License; Must be able to lift heavy loads; Must be able to pass drug testing and physical exam; Must have good driving record.

Occupational Pathways

Truck drivers can move into ownership roles, management roles, and logistics planning roles.

Certifications, Licensure and Other Credential Requirements

CREDENTIAL	Offered By	Before, During or After Apprenticeship
Commercial Driver's License	Truck driving schools certified by the Department of Transportation	Before

Job Functions

JOB FUNCTIONS		Core or Optional
1.	Maintain a safe vehicle in good operating order and in compliance with legal and regulatory requirements	Core or Optional
2.	Properly and safely prepare vehicle, including loading	Core or Optional
3.	Safely travel and transport goods (if loaded) to correct location, meeting or exceeding deadlines	Core or Optional
4.	Pick up and deliver cargo on time and in good condition	Core or Optional
5.	Utilize appropriate vehicle communication devices; communicates with others regarding vehicle operation and maintenance, safe driving protocols, and cargo transportation and delivery	Core or Optional
6.	Maintain accurate and complete records related to travel times, distances, expenses, and delivery of products	Core or Optional
7.	Drive truck during the day and at night, in a variety of weather situations and in road conditions	Core or Optional
8.	Operate according to health, safety and environmental standards, best practices, and requirements	Core or Optional

Stackable Programs

This occupational framework is designed to link to the following additional framework(s) as part of a career laddering pathway.

Stackable Programs		Base or Higher Level	Stacks on top of
1.		Base Program	
2.			
3.			
4.			

Options and Specializations

The following options and specializations have been identified for this occupation. The Work Process Schedule and individual job function outlines indicate which job functions and competencies were deemed by industry advisors to be optional. Work Process Schedules for Specializations are included at the end of this document.

Options and Specializations	Option	Specialization

Levels

Industry advisors have indicated that individuals in this occupation may function at different levels, based on the nature of their work, the amount of time spent in an apprenticeship, the level of skills or knowledge mastery, the degree of independence in performing the job or supervisory/management responsibilities.

Level	Distinguishing Features	Added Competencies	Added Time Requirements

Work Process Schedule

WORK PROCESS SCHEDULE		ONET Code: 53-3032.00	
Heavy and Tractor Trailer Truck Driver		RAPIDS Code: 2072CB	
JOB TITLE:			
LEVEL:		SPECIALIZATION:	
STACKABLE PROGRAM <input type="checkbox"/> yes <input type="checkbox"/> no			
BASE OCCUPATION NAME:			
Company Contact: Name			
Address:		Phone	Email
Apprenticeship Type: <input type="checkbox"/> Competency-Based <input type="checkbox"/> Time-Based <input type="checkbox"/> Hybrid		Prerequisites	
JOB FUNCTION 1: Maintain a safe vehicle in good operating order and in compliance with legal and regulatory requirements			
Competencies	Core or Optional	RTI	OJT
A. Check vehicle to make sure that mechanical, safety and emergency equipment is in good working order	Core		
B. Maintain accurate logs of working hours, engine miles, vehicle service and repair status to ensure compliance with applicable state and federal regulations	Core		
C. Complete a vehicle inspection report	Core		

JOB FUNCTION 2: Properly and safely prepare vehicle, including loading			
Competencies	Core or Optional	RTI	OJT
A. Conduct pre-trip inspection of critical vehicle components and complete Driver Vehicle Inspection Report	Core		
B. Perform en route inspections to ensure proper and safe operation of vehicle	Core		
C. Perform post-trip inspection and make notes of actual or suspected abnormalities or malfunctions	Core		
D. Couple tractor and trailer safely and properly	Core		
E. Uncouple tractor and trailer safely and properly	Core		
F. Make efficient trip plans taking into account fuel use, ease of transport, hazards mitigation, and state regulations	Core		
JOB FUNCTION 3: Safely travel and transport goods (if loaded) to correct location, meeting or exceeding deadlines			
Competencies	Core or Optional	RTI	OJT
A. Enter and start the vehicle properly	Core or Optional		
B. Put vehicle in motion and drive properly and safely	Core or Optional		
C. Shift properly to maintain speed and motion	Core or Optional		
D. Operate vehicle in reverse and dock in an appropriate and safe manner	Core or Optional		
E. Bring vehicle to a stop, including parking	Core or Optional		
F. Conduct preemptive visual search to stay alert to and enable appropriate defensive response to hazards	Core or Optional		
G. Manage speed to ensure safe passage and conformance with state and federal laws and regulations	Core or Optional		
H. Maintain proper vehicle spacing for safe operation and hazard response	Core or Optional		

I. Exercise appropriate precautions at railroad crossings	Core or Optional		
JOB FUNCTION 4: Pick up and deliver cargo on time and in good condition			
Competencies	Core or Optional	RTI	OJT
A. Verify cargo types, nature, amount, and condition of cargo at pick-up and delivery	Core or Optional		
B. Load, secure, and cover cargo as necessary and deliver to appropriate location	Core or Optional		
C. Obtain necessary permits to transport cargo, if necessary	Core or Optional		
D. Appropriately secure and protect high risk and high value cargo, obtaining necessary approvals and insurance coverage if necessary	Core or Optional		
E. Accurately weigh loads and maintain weight distribution requirements	Core or Optional		
JOB FUNCTION 5: Utilize appropriate vehicle communication devices; communicate with others regarding vehicle operation and maintenance, safe driving protocols, and cargo transportation and delivery			
Competencies	Core or Optional	RTI	OJT
A. Use appropriate signals and vehicle communications technology to communicate with other drivers	Core or Optional		
B. Communicate appropriately with company dispatch operators and others engaged in the loading and receiving of goods	Core or Optional		
C. Report malfunctions, breakdowns, or maintenance needs accurately and promptly	Core or Optional		
D. Document cargo transportation and delivery specifications and actions	Core or Optional		
E. Seek manager authorizations when necessary	Core or Optional		
F. Maintain positive customer relations	Core or Optional		
G. Seek roadside assistance from appropriate sources, when necessary	Core or Optional		

JOB FUNCTION 6: Maintain accurate and complete records related to travel times, distances, expenses, and delivery of products

Competencies	Core or Optional	RTI	OJT
A. Maintain accurate records regarding trip route, time, estimated fuel requirement and cargo	Core or Optional		
B. Follow regulations and procedures to obtain special permits when necessary	Core or Optional		
C. Correctly complete and submit cargo claims in the event of loss, damage, or refusal upon delivery	Core or Optional		
D. Maintain records regarding load weights	Core or Optional		

JOB FUNCTION 7: Drive truck during the day and at night, in a variety of weather situations and road conditions

Competencies	Core or Optional	RTI	OJT
A. Operate vehicle safely at night	Core or Optional		
B. Operate vehicle safely in cold weather	Core or Optional		
C. Operate vehicle safely in hot weather	Core or Optional		
D. Operate vehicle safely in mountainous terrain	Core or Optional		
E. Operate vehicle safely in wet conditions	Core or Optional		
F. Operate vehicle safely in windy conditions	Core or Optional		
G. Operate vehicle safely in construction zones	Core or Optional		
H. Scan, detect, and respond properly to potential dangers in the driving environment	Core or Optional		
I. Use emergency maneuvers to avoid or recover from skids	Core or Optional		

JOB FUNCTION 8: Operate according to health, safety and environmental standards, best practices, and requirements

Competencies	Core	RTI	OJT
A. Comply with hours of service requirements	Core or Optional		
B. Operate in a way that minimizes negative impact of transportation on environmental health and safety	Core or Optional		
C. Respond appropriately and complete proper documentation in the event of an accident	Core or Optional		
D. Manage life on the road to minimize stress and maintain health	Core or Optional		

Specialization

Type of Specialization: _____

JOB FUNCTION 1:		
Competencies	RTI	OJT

JOB FUNCTION 2:		
Competencies	RTI	OJT

JOB FUNCTION 3:		
Competencies	RTI	OJT

JOB FUNCTION 4:		
Competencies	RTI	OJT
JOB FUNCTION 5:		
Competencies	RTI	OJT
JOB FUNCTION 6:		
Competencies	RTI	OJT

JOB FUNCTION 7:

Competencies	RTI	OJT

JOB FUNCTION 8:

Competencies	RTI	OJT

Related Technical Instruction Plan

COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	
COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	
COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	

COURSE NAME	Course Number
	Hours

LEARNING OBJECTIVES

COURSE NAME	Course Number
	Hours

LEARNING OBJECTIVES

Cross-Cutting Competencies

COMPETENCY**		0	1	2	3	4	5	6	7	8
Personal Effectiveness	Interpersonal Skills	0	1	2	3	4	5	6	7	8
	Integrity	0	1	2	3	4	5	6	7	8
	Professionalism	0	1	2	3	4	5	6	7	8
	Initiative	0	1	2	3	4	5	6	7	8
	Dependability and Reliability	0	1	2	3	4	5	6	7	8
	Adaptability and Flexibility	0	1	2	3	4	5	6	7	8
	Lifelong Learning	0	1	2	3	4	5	6	7	8
Academic	Reading	0	1	2	3	4	5	6	7	8
	Writing	0	1	2	3	4	5	6	7	8
	Mathematics	0	1	2	3	4	5	6	7	8
	Science & Technology	0	1	2	3	4	5	6	7	8
	Communication	0	1	2	3	4	5	6	7	8
	Critical and Analytical Thinking	0	1	2	3	4	5	6	7	8
	Basic Computer Skills	0	1	2	3	4	5	6	7	8
Workplace	Teamwork	0	1	2	3	4	5	6	7	8
	Customer Focus	0	1	2	3	4	5	6	7	8
	Planning and Organization	0	1	2	3	4	5	6	7	8
	Creative Thinking	0	1	2	3	4	5	6	7	8
	Problem Solving & Decision Making	0	1	2	3	4	5	6	7	8
	Working with Tools & Technology	0	1	2	3	4	5	6	7	8
	Checking, Examining & Recording	0	1	2	3	4	5	6	7	8
	Business Fundamentals	0	1	2	3	4	5	6	7	8
	Sustainable	0	1	2	3	4	5	6	7	8
	Health & Safety	0	1	2	3	4	5	6	7	8

****Cross-cutting competencies are defined in the Competency Model Clearinghouse:**

<https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx>

Cross-Cutting Competencies identify transferable skills – sometimes called “soft skills” or “employability skills” – that are important for workplace success, regardless of a person’s occupation. Still, the relative importance of specific cross-cutting competencies differs from occupation to occupation. The Cross-Cutting Competencies table, above, provides information about which of these competencies is most important to be successful in a particular occupation. This information can be useful to employers or intermediaries in screening and selecting candidates for apprenticeship programs, or to pre-apprenticeship providers that seek to prepare individuals for successful entry into an apprenticeship program.

The names of the cross-cutting competencies come from the U.S. Department of Labor’s Competency Model Clearinghouse and definitions for each can be viewed at

<https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx>

The scoring system utilized to evaluate the level of competency required in each cross cutting skill aligns with the recommendations of the Lumina Foundation’s Connecting Credentials Framework. The framework can be found at: <http://connectingcredentials.org/wp-content/uploads/2015/05/ConnectingCredentials-4-29-30.pdf>

Detailed Job Functions

JOB FUNCTION 1: Maintain a safe vehicle in good operating order and in compliance with legal and regulatory requirements

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> Federal and state legal and regulatory requirements that apply to heavy and long-haul trucks Federal Motor Carrier Safety Regulations Location and function of primary controls including steering, acceleration, braking, shifting and parking Location and function of secondary controls, including lights, signals, windshield wipers and washers, interior climate, engine starting Vehicle parts and frequency of maintenance or replacement Basic mechanical functions—lifts, pulleys, winches, engines, brakes Acceptable operating ranges of truck instruments, such as speedometer, fuel gauge, oil gauge, air pressure, cooling system, exhaust system and electronic systems OSHA regulations for hazardous waste handling, spill/clean up and disposal 	<ul style="list-style-type: none"> Basic mechanical assessment and repair skills Observational and hearing skills Paying attention to details Visual acuity 	<ul style="list-style-type: none"> Hand tools/power tools Winches Trailer hitches Two-way radio Hazardous materials containment and clean-up containers

Competency A: Check vehicle to make sure that mechanical, safety and emergency equipment is in good working order	Core or Optional
PERFORMANCE CRITERIA	
1. Checks steering, engine systems (fuel, oil, coolant, battery and electrical systems, air intake, filters and exhaust system) and temperature, brakes, tires (tread, lug nuts and pressure), protective flaps, windshield washer fluid levels and takes note of items needing service, repair or replenishment. Identifies and resolves malfunctions.	Core or Optional
2. Checks fire extinguishers or other fire suppressant technologies are accessible, are appropriate given the composition of cargo, and are not expired	Core or Optional
3. Maintains hazardous spill clean-up materials, such as absorbent pads, gravel or soil	Core or Optional

4. Maintains and reviews service history and travel logs to ensure that mileage-based repairs or servicing are completed as needed	Core or Optional
5. Notifies appropriate manager or authority if a mechanical or safety concern is noted	Core or Optional
6. Identifies appropriate individuals or facilities to provide vehicle servicing and repair	Core or Optional
7. Checks internal and external lights and turn signals and cleans lenses/replaces bulbs when necessary	Core or Optional
8. Check drive train coupling and suspension systems	Core or Optional
9. Opens hood to check fluid levels and condition of hoses and belts	Core or Optional
Competency B: Maintain accurate logs of working hours, engine miles, vehicle service and repair status to ensure compliance with applicable state and federal regulations	Core or Optional
PERFORMANCE CRITERIA	
1. Complies with federal and state regulations	Core or Optional
2. Keeps accurate and up-to-date records using appropriate log books or technology, where appropriate	Core or Optional
3. Arranges for a secure place for vehicle during travel layovers, especially when transporting hazardous material	Core or Optional
Competency C: Complete a vehicle inspection report	Core or Optional
PERFORMANCE CRITERIA	
1. Reports vehicle defects, accidents, traffic violations or damage to the vehicle	Core or Optional
2. Accepts accountability for the safe operation of the vehicle	Core or Optional

JOB FUNCTION 2: Properly and safely prepare vehicle, including loading

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> Federal, state and other regulations governing inspection, including special regulations regarding hazardous cargo 	<ul style="list-style-type: none"> Visual acuity Tactile acuity Ability to record information accurately Ability to perform calculations to estimate travel distance, time, fuel usage, etc. 	<ul style="list-style-type: none"> Coupling devices, hitches GPS devices

Competency A: Conduct pre-trip inspection of critical vehicle components and complete Driver Vehicle Inspection Report	Core or Optional
PERFORMANCE CRITERIA	
1. Reviews previous day's post-trip report	Core or Optional
2. Inspects instruments and controls, taking note of malfunction and seeking corrective action	Core or Optional
3. Adjusts seat and mirrors according to driver height and vehicle sight lines	Core or Optional
4. Visually inspects engine and drive train and listens to detect abnormal sounds	Core or Optional
5. Visually inspects chassis and suspension	Core or Optional
6. Tests steering and braking systems to ensure proper function	Core or Optional
7. Inspects wheels, rims and tires, including measuring tire tread, to ensure proper structure and function	Core or Optional
8. Tests lighting and signaling system	Core or Optional
9. Inspects coupling system to ensure proper connection	Core or Optional

10. Verifies that safety equipment is present, meets appropriate specifications are not expired	Core or Optional
11. Refuses to operate vehicle that fails inspections and poses safety threat to driver, vehicle, others on the road, the community or the environment	Core or Optional
Competency B: Perform en route inspections to ensure proper and safe operation of vehicle	Core or Optional
PERFORMANCE CRITERIA	
1. Checks mirrors while driving to check for signs of problems or malfunction	Core or Optional
2. Monitors instruments and gauges to ensure operation is within appropriate range	Core or Optional
3. Looks, listens and feels for malfunctions	Core or Optional
4. Makes periodic roadside inspections of critical components	Core or Optional
5. Inspects cargo to ensure it is secure and appropriately protected, heated, cooled or contained	Core or Optional
6. Safely pulls off the road or finds appropriate parking for vehicle that is malfunctioning or is suspected to be malfunctioning	Core or Optional
Competency C: Perform post-trip inspection and make notes of actual or suspected abnormalities or malfunctions	Core or Optional
PERFORMANCE CRITERIA	
1. Inspect all systems as described above and makes note of actual or suspected abnormalities	Core or Optional
2. Completes driver vehicle inspection report	Core or Optional
Competency D: Couple tractor and trailer safely and properly	Core or Optional
PERFORMANCE CRITERIA	
1. Aligns tractor and trailer in straight line	Core or Optional
2. Secures trailer against movement and adjusts trailer height to ensure that it is slightly higher than the 5 th wheel	Core or Optional
3. Backs tractor into trailer kingpin slowly, at right level and with appropriate force	Core or Optional

4. Checks pin and coupling engagement and tests for security	Core or Optional
5. Connect and check air and electrical lines to ensure proper climate and proper function of lights, signals, brakes, etc.	Core or Optional
6. Set in-cab air brake controls	Core or Optional
7. Retracts and secures landing gear and handle	Core or Optional
Competency E: Uncouple tractor and trailer safely and properly	Core or Optional
PERFORMANCE CRITERIA	
1. Spot trailer on surface capable of supporting weight and secure vehicle against movement	Core or Optional
2. Lower gear to raise trailer to correct height and check support	Core or Optional
3. Disconnect and security air and electrical lines prior to uncoupling	Core or Optional
4. Uncouple trailer using correct procedures	Core or Optional
Competency F: Make efficient trip plans taking into account fuel use, ease of transport, hazards mitigation and state regulations	Core or Optional
PERFORMANCE CRITERIA	
1. Plans a route from one point to another that is optimal in terms of travel time, fuel costs, potential hazards and federal/state/provincial/local travel restrict	Core or Optional
2. Arranges to secure permits required by the nature of the vehicle, its cargo and the route to be traveled	Core or Optional
3. Calculates miles, fuel use, stops and expenses and obtains funding for expenses	Core or Optional
4. Interprets maps and GPS devices properly	Core or Optional
5. Estimates travel time and plans rest stops and layovers to comply with hours of service regulations	Core or Optional
6. Documents expenses according to policy	Core or Optional

JOB FUNCTION 3: Safely travel and transport goods (if loaded) to correct location, meeting or exceeding deadlines

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • OSHA and DOT regulations regarding transport of hazardous materials • Rules of the road • Requirement for transport of perishable goods • Hazardous condition protocols • Relationships between MPH and RPM • Principles of reverse steering • Safe braking distance based on vehicle size, weight and distance to next vehicle or object • Laws and consequences regarding moving vehicle violations • Effect of speed on center of gravity, loss of stability, sight distance and surface conditions • Basic formula for determining safe following distance • Fuel performance standards based on engine operation and proper shifting techniques 	<ul style="list-style-type: none"> • Good reflexes • Defensive driving • Operation of vehicle • Use of loading/unloading devices • Use of refrigerant systems • Emergency repairs—tires, exhaust systems, fire suppression, lights • Proper shifting procedures and patterns based on transmission type; RPM and MPH for proper gear selection • Reading a map or programming a GPS device 	<ul style="list-style-type: none"> • Lifts, winches and hydraulics • Maps and GPS devices • Emergency equipment

Competency A: Enter and start the vehicle properly	Core or Optional
PERFORMANCE CRITERIA	
1. Adjusts seat and mirrors to ensure good sight lines and access to primary and secondary controls	Core or Optional
2. Warms engine up before putting in gear	Core or Optional
Competency B: Put vehicle in motion and drive properly and safely	Core or Optional
PERFORMANCE CRITERIA	

1. Accelerates smoothly	Core or Optional
2. Monitors controls, mirrors, instruments and gauges to ensure proper and safe operation	Core or Optional
3. Maintains vehicle in center of lane, driving in a straight line	Core or Optional
4. Maintains appropriate vehicle and engine speed, including on upgrades and downgrades	Core or Optional
5. Negotiate left and right curves and sharp turns for various trailer lengths	Core or Optional
6. Maintains appropriate clearance when maneuvering around obstacles or obstructions	Core or Optional
7. Uses proper hand placement on steering wheel and shifters	Core or Optional
8. Remains focused and avoids distractions	Core or Optional
9. Does not text or use cell phone while driving	Core or Optional
Competency C: Shift properly to maintain speed and motion	Core or Optional
PERFORMANCE CRITERIA	
1. Shifts to maintain speed and reduce engine strain	Core or Optional
2. Shifts to optimize fuel mileage and reduce operating costs	Core or Optional
3. Shifts to optimize fuel mileage and reduce operating costs	Core or Optional
4. Uses proper gear to navigate according to traffic, terrain, turns, speed and highway conditions	Core or Optional
5. Stops in any gear	Core or Optional
6. Engages in proper gear recovery	Core or Optional
Competency D: Operate vehicle in reverse and dock in an appropriate and safe manner	Core or Optional
PERFORMANCE CRITERIA	

1. Checks and adjusts mirrors to ensure good visibility around and behind vehicle	Core or Optional
2. Checks for obstructions and position and determines appropriate path and clearances prior to backing	Core or Optional
3. Activates warning flashers and sounds horn if CMV does not have back up alarm	Core or Optional
4. Keeps window open and radio off	Core or Optional
5. Positions vehicle correction before backing or docking, backs slowly in straight and curved lines	Core or Optional
6. Uses appropriate guides and spotters to back up	Core or Optional
7. Backs into restricted space and abides by space conditions when backing or parking	Core or Optional
8. Executes reverse steering of an articulated vehicle	Core or Optional
Competency E: Bring vehicle to a stop, including parking	Core or Optional
PERFORMANCE CRITERIA	
1. Brakes gently and properly	Core or Optional
2. Maintains proper distance between other vehicles to ensure adequate braking distance depending upon speed and grade	Core or Optional
Competency F: Conduct preemptive visual search to stay alert to and enable appropriate defensive response to hazards	Core or Optional
PERFORMANCE CRITERIA	
1. Adjusts mirrors to ensure widest possible field of view and inspection of important points of movement	Core or Optional
2. Visually scans up to 10 to 12 seconds ahead of current position to identify hazards	Core or Optional
3. Scans both sides of the highway and uses quick glances to observe roadside activity and vehicles nearby	Core or Optional
4. Checks mirrors of hazards regularly and always before changing speed or direction	Core or Optional
5. Checks instrument panel frequently	Core or Optional

6. Looks ahead as far as possible during turns and on curves	Core or Optional
7. Checks both sides before turning or changing lanes	Core or Optional
8. Monitors overtaking traffic in order to be aware of vehicles behind and in blind spots	Core or Optional
9. Avoid diverting attention from path ahead	Core or Optional
Competency G: Manages speed to ensure safe passage and conformance with state and federal laws and regulations	Core or Optional
PERFORMANCE CRITERIA	
1. Monitors speedometer regularly	Core or Optional
2. Monitors speed limit signs regularly	Core or Optional
Competency H: Maintain proper vehicle spacing for safe operation and hazard response	Core or Optional
PERFORMANCE CRITERIA	
1. Properly judges adequacy of gaps in traffic for passing, crossing traffic, entering traffic and changing lanes	Core or Optional
2. Properly positions vehicle for making all driving maneuvers and avoids placing other vehicles or pedestrians in jeopardy	Core or Optional
Competency I: Exercise appropriate precautions at railroad crossings	Core or Optional
PERFORMANCE CRITERIA	
1. Approaches crossings with caution, turns off communications devices and rolls window down to listen for oncoming traffic and warnings	Core or Optional
2. Comes to a complete stop when required, maintaining safe distance from crossing	Core or Optional
3. Maintains speed without shifting or stopping, when appropriate, and does not cross until there is ample room to clear the tracks	Core or Optional
4. Ensures there is ample undercarriage clearance before crossing	Core or Optional
5. Obeys railroad signals or direction at crossing	Core or Optional

JOB FUNCTION 4: Pick up and deliver cargo on time and in good condition

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> Federal and state regulations regarding safe transport of cargo 	<ul style="list-style-type: none"> Lifting materials using appropriate technique or lifting device Securing cargo 	<ul style="list-style-type: none"> Dollies, hand trucks Pallets, forklift trucks Jacks Nets, slings, rug poles, Johnson bars

Competency A: Verify cargo types, nature, amount, and condition of cargo at pick-up and delivery	Core or Optional
PERFORMANCE CRITERIA	
1. Verify cargo type and quantity	Core or Optional
2. Verify condition of cargo	Core or Optional
3. Verify that load distribution on trailer fits within regulations	Core or Optional
4. Verify seals, if used	Core or Optional
Competency B: Load, secure, and cover cargo as necessary and deliver to appropriate location	Core or Optional
PERFORMANCE CRITERIA	
1. Cover cargo, as necessary	Core or Optional
2. Select proper sizes of chain, cable, nylon webbing, steel strapping or rope to secure cargo	Core or Optional
3. Inspect cargo regularly throughout transport	Core or Optional
4. Demonstrate proper lifting techniques required to safely load and unload cargo	Core or Optional
5. Operate common types of cargo handling equipment	Core or Optional

Competency C: Obtain necessary permits to transport cargo, if necessary	Core or Optional
PERFORMANCE CRITERIA	
1. Correctly identifies whether the load includes hazardous materials	Core or Optional
2. Applies for and receives correct permits when transporting hazardous materials	Core or Optional
3. Identifies appropriate travel route based on load, hazmat or other travel restrictions	Core or Optional
4. Obtains appropriate documents and approvals before transporting goods across country boards (into Mexico or Canada)	Core or Optional
Competency D: Appropriately secure and protect high risk and high value cargo, obtaining necessary approvals and insurance coverage if necessary	Core or Optional
PERFORMANCE CRITERIA	
1. Identifies contents of cargo and determines if high value or hazardous cargo are present	Core or Optional
2. Communicates with manager to understand special precautions that should be taken	Core or Optional
3. Obtains permits or necessary documents to allow for safe and legal transportation	Core or Optional
4. Ensures that appropriate first-response, containment or fire suppression equipment is readily available and is appropriate for the type of cargo being transported	Core or Optional
5. Selects and properly applies protective strappings, containment tanks, wrapping, etc. to ensure safe transport and reduce potential for damage in the event of an accident.	Core or Optional
Competency E: Accurately weighs loads and maintain weight distribution requirements	Core or Optional
PERFORMANCE CRITERIA	
1. Approaches weigh station slowly and carefully	Core or Optional
2. Measures and records weight accurately	Core or Optional
3. Accurately determines load weights by subtracting prior weight from loaded weight	Core or Optional

JOB FUNCTION 5: Utilize appropriate vehicle communication devices; communicate with others regarding vehicle operation and maintenance, safe driving protocols, and cargo transportation and delivery

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> State laws for the use of turn signals Conditions under which other drivers may give false signals 	<ul style="list-style-type: none"> Speaks clearly and professionally Articulates thoughts clearly and succinctly Resolves conflicts while remaining calm 	<ul style="list-style-type: none"> CB radio Cell phone Laptop or tablet Vehicle signals—flashers, horn, lights, bright lights Hydraulic lifts/forklifts

Competency A: Use appropriate signals and vehicle communications technology to communicate with other drivers	Core or Optional
PERFORMANCE CRITERIA	
1. Uses signals to notify others of intent to change position and cancel signal after completing turn or lane change	Core or Optional
2. Uses horn and lights (such as flashing brake lights, four-way flashers and use of headlights in the daytime) to avert danger and notify others of vehicle actions.	Core or Optional
3. While driving use CB radio only for communication that will enhance safety and traffic flow	Core or Optional
4. Establishes eye contact with other drivers and pedestrians and avoids using signals to inform other drivers of what they should do	Core or Optional
5. Avoid using on-board and personal communication devices while driving	Core or Optional

Competency B: Communicate appropriately with company dispatch operators and others engaged in the loading and receiving of goods	Core or Optional

PERFORMANCE CRITERIA	
1. Speaks clearly and directly to others	Core or Optional
2. Avoids the use of jargon that may not be known to others	Core or Optional
3. Present professional image in all communication	Core or Optional
4. Use correct English to share information or report details	Core or Optional
Competency C: Report malfunctions, breakdowns or maintenance needs accurately and promptly	Core or Optional
PERFORMANCE CRITERIA	
1. Describes symptoms of improper operation completely and accurately to maintenance personnel	Core or Optional
2. Avoids attempting to perform maintenance for which driver is not qualified	Core or Optional
3. Reports breakdowns en route according to company policy	Core or Optional
4. Match symptoms to possible list of problems	Core or Optional
Competency D: Document cargo transportation and delivery specifications and actions	Core or Optional
PERFORMANCE CRITERIA	
1. Prepare cargo manifest, verifying cargo types, nature, amount, and condition upon pickup and delivery	Core or Optional
2. Verify seals, if used	Core or Optional
3. Verify information on bill of lading and properly record/report discrepancies and damage	Core or Optional
4. Verify that placards match load and meet regulations; correct if needed	Core or Optional
Competency E: Seeks manager authorizations when necessary	Core or Optional
PERFORMANCE CRITERIA	
1. Properly identifies issues or documents that require manager authorization	Core or Optional

2. Seeks manager authorization according to company policies	Core or Optional
3. Seeks manager authorization in a timely manner so as to avoid last minute requests for authorization	Core or Optional
4. Provides all necessary information, documents and other relevant materials to support manager review	Core or Optional
5. Interacts with manager through clear and concise language and with appropriate decorum	Core or Optional
Competency F: Maintain positive customer relations	Core or Optional
PERFORMANCE CRITERIA	
1. Drives courteously rather than aggressively and in compliance with traffic rules	Core or Optional
2. Speaks clearly when interacting with customers	Core or Optional
3. Communicates information accurately and succinctly when interacting with customers and colleagues	Core or Optional
4. Handles complaints appropriately, including by engaging a supervisor if necessary	Core or Optional
5. In the event of an accident, treats other drivers or passengers courteously and acts quickly to seek assistance and maintain safety	Core or Optional
6. Notifies customers in advance of anticipated delivery time (if appropriate), or of potential/likely delays	Core or Optional
Competency G: Seek roadside assistance from appropriate sources, when necessary	Core or Optional
PERFORMANCE CRITERIA	
1. Contacts appropriate providers of roadside assistance based on problem or need	Core or Optional
2. Uses appropriate procedures to receive authorization, when necessary, to seek roadside assistance	Core or Optional
3. Accurately describes problem or concern in seeking assistance	Core or Optional
4. Seeks the assistance of first responders in the event of an accident, injury or similar circumstances	Core or Optional

JOB FUNCTION 6: Maintain accurate and complete records related to travel times, distances, expenses and delivery of products

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Company policies regarding completion of forms • Use of software for proof of delivery • Knows when to obtain signatures as proof of delivery and from whom to obtain those signatures 	<ul style="list-style-type: none"> • Writing clearly • Use of computers and hand-held devices • Comparing addresses or cargo numbers on items with those listed on cargo lists or customer orders • Completing forms 	<ul style="list-style-type: none"> • Computers • Hand-held devices (including those unique to a carrier)

Competency A: Maintain accurate records regarding trip route, time, estimated fuel requirement and cargo	Core or Optional
PERFORMANCE CRITERIA	
1. Accurately records trip route, including activities along the way (if appropriate)	Core or Optional
2. Accurately estimates fuel requirements, logs refueling activities and calculates total fuel usage	Core or Optional
3. Maintains records related to receiving, transporting and delivering cargo	Core or Optional
Competency B: Follow regulations and procedures to obtain special permits when necessary	Core or Optional
PERFORMANCE CRITERIA	
1. Applies for and obtains travel permits when necessary, such as for wide loads or transportation of hazardous materials	Core or Optional
2. Avoids roadways that have vehicle type, weight, noise or hours restrictions when appropriate	Core or Optional
3. Follows security procedures at pick-up and drop-off locations according to vendor or client requirements	Core or Optional

Competency C: Correctly complete and submit cargo claims in the event of loss, damage or refusal upon delivery	Core or Optional
PERFORMANCE CRITERIA	
1. Accurately records cargo damage or loss	Core or Optional
2. Notifies appropriate individuals about cargo loss or damage	Core or Optional
3. Seeks assistance, when necessary, in filing cargo claims	Core or Optional
4. Provides supporting documentation, when required, to explain source of loss or damage	Core or Optional
5. Write clearly and succinctly without providing extraneous details	Core or Optional
Competency D: Maintain records regarding load weights	Core or Optional
PERFORMANCE CRITERIA	
1. Stops at weigh stations to determine weight of empty vehicle and weight of cargo	Core or Optional
2. Complies with rules regarding frequency of weighing	Core or Optional
3. Accurately records weights	Core or Optional
4. Complies with weight restrictions, including those related to changing weather or road conditions	Core or Optional

JOB FUNCTION 7: Drive truck during the day and at night, in a variety of weather situations and road conditions

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Impact of light, darkness and headlights on visual acuity • State laws regarding use of headlights and high beams • Factors affecting night vision including use of sunglasses during the day and interior illumination at night • Patterns of wildlife movement at night • Impact of hot and cold weather on engine function, tire pressure and road conditions • Skid dynamics, including friction, wheel load and force 	<ul style="list-style-type: none"> • Evasive steering techniques • Navigates challenging road conditions • Accelerating and braking based on road conditions • Adjusting mirrors and lights 	<ul style="list-style-type: none"> • Maps and GPS devices • Emergency equipment

Competency A: Operate vehicle safely at night	Core or Optional
PERFORMANCE CRITERIA	
1. Judges and adjusts speed, distances and separation under nighttime conditions	Core or Optional
2. Employs heightened scanning for night technique	Core or Optional
3. Uses high beams legally and dims headlights in accordance with law and safety	Core or Optional
4. Responds safely to glare of other vehicles	Core or Optional
5. Manages fatigue and pulls over/parks when fatigue is interfering with safe travel	Core or Optional
Competency B: Operate vehicle safely in hot weather	Core or Optional
PERFORMANCE CRITERIA	
1. Maintains appropriate tire pressures based on potential expansion in heat	Core or Optional
2. Maintains personal hydration to avoid health hazards	Core or Optional

3. Monitors temperature gauges to identify and respond to signs of overheating	Core or Optional
4. Uses air conditioning as needed but consistent with fuel conservation and environmental health best practices	Core or Optional
Competency C: Operate vehicle safely in cold weather	Core or Optional
PERFORMANCE CRITERIA	
1. Prepare vehicle for operation in cold weather, including removal of snow and ice from windows, mirrors, brakes, lights, hand holds and steps, air hoses, electrical wiring and radiator shutters	Core or Optional
2. Inspects vehicle for cold weather operation, including coolant levels and mixture, heater, defrosters, wipers, washers, tire tread, brakes, lights, reflectors, wiring systems, hoses, fuel exhaust system and fifth wheel	Core or Optional
3. Extracts moisture from air tanks after each trip	Core or Optional
4. Utilizes cold weather starting procedures	Core or Optional
5. Adjusts rate of change in speed and direction to highway conditions to avoid skidding	Core or Optional
6. Coordinates acceleration and shifting to overcome the resistance of snow, sand and mud	Core or Optional
7. Extricates vehicle from snow, sand and mud by maneuvering or towing	Core or Optional
8. Carries additional clothing and supplies to deal with weather conditions and delays	Core or Optional
Competency D: Operate vehicle safely in mountainous terrain	Core or Optional
PERFORMANCE CRITERIA	
1. Checks brake adjustment prior to mountain driving	Core or Optional
2. Uses right lane or designated truck lane	Core or Optional
3. Places transmission in correct gear for engine speed on downgrade	Core or Optional
4. Uses proper braking technique and maintains proper engine speed during downgrade	Core or Optional
5. Uses special speed reduction devices (i.e.. Engine brakes) properly	Core or Optional

6. Uses truck escape ramp in the event of brake failure on a downgrade	Core or Optional
7. Monitors brakes for overheating	Core or Optional
8. Observes temperature gauge frequently	Core or Optional
9. Uses 4-way flashers in accordance with local laws	Core or Optional
Competency E: Operate vehicle safely in wet conditions	Core or Optional
PERFORMANCE CRITERIA	
1. Demonstrates driving techniques to avoid skidding and to recover from a skid	Core or Optional
2. Demonstrates proper braking technique in ice, snow, mud, water and when debris is present	Core or Optional
3. Selects correct speed, uses brakes, changes direction and appropriate following distance based on weather and road conditions	Core or Optional
4. Ensures safe operation of brakes after driving through deep water	Core or Optional
5. Uses windshield wipers, washers and defrosters to maintain visibility	Core or Optional
6. Uses trailer brakes when necessary on slippery roads	Core or Optional
Competency F: Operate vehicle safely in windy conditions	Core or Optional
PERFORMANCE CRITERIA	
1. Corrects fuel planning based on impact of wind on speed and resistance	Core or Optional
2. Properly steers vehicle to compensate for impact of wind	Core or Optional
3. Avoids dangerous situations, such as bridges, when exceptional wind speeds make it unsafe	Core or Optional
4. Scans frequently for highway debris	Core or Optional
5. Maintains increased following distance	Core or Optional
Competency G: Operate vehicle safely in mountainous terrain	Core or Optional

PERFORMANCE CRITERIA	
1. Checks brake adjustment prior to mountain driving	Core or Optional
2. Uses right lane or designated truck lane	Core or Optional
3. Places transmission in correct gear for engine speed on downgrade	Core or Optional
4. Uses proper braking technique and maintains proper engine speed during downgrade	Core or Optional
5. Uses special speed reduction devices (i.e.. Engine brakes) properly	Core or Optional
6. Uses truck escape ramp in the event of brake failure on a downgrade	Core or Optional
7. Monitors brakes for overheating	Core or Optional
8. Observes temperature gauge frequently	Core or Optional
9. Uses 4-way flashers in accordance with local laws	Core or Optional
Competency H: Scan, detect, and respond properly to potential dangers in the driving environment	Core or Optional
PERFORMANCE CRITERIA	
1. Perceives immediately a potential threat from visible characteristics and actions of other highway users, highway conditions and the environment	Core or Optional
2. Initiates prompt and defensive or evasive action	Core or Optional
3. Uses proper evasive steering techniques	Core or Optional
4. Removes, avoids or corrects dangerous situations when appropriate	Core or Optional
Competency I: Use emergency maneuvers to avoid or recover from skids	Core or Optional
PERFORMANCE CRITERIA	
1. Perceives immediately a potential threat from visible characteristics and actions of other highway users, highway conditions and the environment	Core or Optional
2. Initiates prompt and defensive or evasive action	Core or Optional

3. Uses proper evasive steering techniques	Core or Optional
4. Uses safe speed in slippery conditions	Core or Optional
5. Uses proper steering and stoppage to avoid hazard or accident, especially in wet conditions	Core or Optional
6. Uses proper techniques to recover from skidding and prevent jackknifing	Core or Optional

JOB FUNCTION 8: Operate according to health, safety and environmental standards, best practices and requirements

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Emergency Response Guide protocols for responding to spills or leaks • Federal/state laws regarding environmental requirements/regulations • Part 395 of the FMCSR-Hours of Service • Use of accident report forms • Fire extinguisher ratings • Wellness maintenance technique—diet, exercise, personal finance, stress management techniques, sleep requirements, effects of drugs or alcohol, signs of and control of fatigue • Company rules regarding stopping to assist at the scene of an accident 	<ul style="list-style-type: none"> • Mathematics • Timekeeping • Routine inspection procedures • Extinguishing cargo, engine, electrical, and tire fires 	<ul style="list-style-type: none"> • Fire extinguishers • Electronic log books/forms • Hazardous waste/materials containment devices

Competency A: Comply with hours of service requirements	Core or Optional
PERFORMANCE CRITERIA	
1. Records driving time accurately in driver log book	Core or Optional
2. Properly calculates driving times, including sums for a given day and remaining hours on a day or tour of duty	Core or Optional
3. Uses log book recap to properly calculate hours of service	Core or Optional
Competency B: Operate in a way that minimizes negative impact of transportation on environmental health and safety	Core or Optional
PERFORMANCE CRITERIA	
1. Checks hoses and couplings regularly to ensure against leakage	Core or Optional
2. Minimizes idle time	Core or Optional

3. Fuels carefully to avoid spills	Core or Optional
4. Reports environmental hazards to appropriate person	Core or Optional
Competency C: Respond appropriately and complete proper documentation in the event of an accident	Core or Optional
PERFORMANCE CRITERIA	
1. Stops and parks safely in the event of an accident	Core or Optional
2. Provides aid for injured individuals if properly trained and certified	Core or Optional
3. Cooperates with first responders or emergency personnel	Core or Optional
4. Operates fire extinguisher properly	Core or Optional
5. Directs traffic, if necessary, until emergency personnel arrive	Core or Optional
6. Obtain information for accident reporting in accordance with company policy	Core or Optional
7. Notifies authorities if hazardous materials are present	Core or Optional
8. Stays at scene until emergency personnel grant permission to leave	Core or Optional
9. Notifies carrier in accordance with policy	Core or Optional
Competency D: Manage life on the road to minimize stress and maintain health	Core or Optional
PERFORMANCE CRITERIA	
1. Monitors fatigue and employ control strategies to ensure safe driving	Core or Optional
2. Follows healthy diet and recreational practices while on the road	Core or Optional
3. Establishes a good exercise program while on the road	Core or Optional
4. Makes safe decisions about where to stop and stay	Core or Optional

5. Practices good personal hygiene	Core or Optional
6. Communicates with family and/or support system frequently or as needed	Core or Optional

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