

Irish Institute of Purchasing & Materials Management

LIFT TRUCK OPERATOR TRAINING

Criteria for Accreditation and Registration by
Training Organisations and Instructors



I.I.P.M.M.

TRAINING TO IMPROVE SAFETY AND EFFICIENCY

The Irish Institute of Purchasing & Materials Management

Criteria for Accreditation and Registration by
Forklift Training Organisations and Instructors.

Contents	Page
Introduction	2
Registration Criteria	3
Application for Registration	4
Monitoring of Training	5
Training Facilities Safety	6
Course Documentation	7
Testing & Certification	8
Industrial Truck Groupings	9
Code of Professional Conduct	11

**All references to the "Institute" in this handbook
are references to the I.I.P.M.M.**

Criteria to be complied with for the Basic Training of Lift Truck Operators.

INTRODUCTION

The Basic Training Standards for Lift Truck operators established by The Irish Institute of Purchasing and Materials Management (I.I.P.M.M.), are generally in line with those adopted by the various Accrediting Bodies in the UK and other countries.

These standards are designed to meet the requirements of the Approved Code of Practice for "Rider-operated lift trucks: operator training", and the Supplementary Guidance published by the Health & Safety Authority.

I.I.P.M.M. will accredit training courses to be carried out on customer premises, or at other training sites that meet the necessary standards.

The requirements for registration as an Accredited Trainer or Training Organisation are as outlined in this handbook.

There are four categories of Training Provider:

1. Non-commercial in-house training schemes.
2. Commercial training on customer premises.
3. Operator Training Centre.
4. Instructor Training Centre.

SAFETY

It is important to note that Employers and Occupiers have the responsibility for the provision of adequate supervision for the safe operation of Lift Trucks. The co-operation of operators and other workers in sharing this responsibility is essential.

It is the duty of accredited Trainers and Training Organisations to ensure that training facilities, Lift Trucks and other equipment used for training is safe.

Registration Criteria

Applications for registration may be made for Registration/Accreditation as follows:

- 1) Existing Training Organisations or Training Providers that can prove that they are currently Accredited and entered on the Register of Approved Training Providers of a Recognised Accrediting Body, will be eligible for direct entry on the Organisation's Register of Accredited Training Providers, until the expiry date of such registration. The documentary evidence set out in the next section "Application for Registration with I.I.P.M.M." should support all applications" together with the Course Documentation set out on page 7.

- 2) Other applicants for Accreditation must undertake an Instructor's Course with an already Accredited Lift Truck Operator and Instructor Training Provider.
The documentary evidence set out in the next section "Application for Registration with I.I.P.M.M. should support all applications" together with Course Documentation set out on page 7 and otherwise meet the requirements contained in this handbook.

- 3) Applications from non-commercial in-house Instructors will be entered in The Institute's Register of Qualified Instructors after satisfactorily completing an Instructor's Course with an already Accredited Lift Truck Operator and Instructor Training Provider.
Non-commercial in-house Instructors will not be accredited to carry out commercial training unless they meet the requirements of 2) above.

Application for Registration with the I.I.P.M.M.

Application for registration as an accredited Trainer or Training Organisation should be made to:

The Chief Executive Officer,
The Irish Institute of Purchasing & Materials Management,
5, Belvedere Place,
Dublin 1.

Applications must include the following information:

1. Name of Person/Organisation & contact details.
2. Details of current Accreditation status.
3. Details of locations where training will be carried out.
4. Full names of Instructors together with details of their existing registration including copies of operator certification held.
5. Full details of courses including syllabuses and detailed programmes. (See Course Documentation on page 7).
6. Details of Practical Skills Tests applied together with a copy of the marking sheet used.
7. An example of the Theory and Pre-operational Inspection Tests applied.
8. A copy of the certificate issued to operators. (see page 8).
9. Copies of Public Liability and Professional Liability Insurance Policies.

Accreditation for Training Arrangements will be approved on an annual basis and will be subject to monitoring visits by an assessor appointed by I.I.P.M.M.

Separate inspections will be carried out when accreditation is sought for a permanent operator training centre.

Fees will be charged by I.I.P.M.M. for monitoring inspection visits.
Current rates can be checked with Head Office.

Monitoring of Training Arrangements

I.I.P.M.M. will be responsible for ensuring that standards for both training and testing are being maintained and that the conditions of accreditation are being complied with. In order to fulfil this responsibility, monitoring visits will be made as follows:

Category 1. *In-house Training Schemes.*

At least once during the twelve-month accreditation period, each accredited In-house Instructor will receive a monitoring visit. At the time of this visit, training and/or testing will be in progress. I.I.P.M.M. inspections will include training/testing standards, suitability of training area, equipment, documentation and records. Instructors must notify I.I.P.M.M. when training courses are planned.

Category 2. *Commercial Training on Customers' Premises.*

Accredited Instructors whose courses have been accredited will receive one monitoring visit at least once during the twelve-month accreditation period whilst conducting training/testing. The visit will include training/testing standards, suitability of equipment and training area, documentation and training records. It is the responsibility of accredited Instructors to notify I.I.P.M.M. when training is planned to take place.

Category 3. *Operator Training Centre.*

Organisations that have accreditation for a permanent Training Centre will receive at least one monitoring visit to the training centre during the twelve-month period of accreditation. The inspection will cover training/testing standards, documentation, training facilities, and suitability of equipment, documentation and records. The inspection may also involve a visit to training being conducted on customer's premises.

Category 4. *Instructor Training Centre.*

Accreditation for Instructor Training will only be approved after the training centre has been visited and training arrangements have been accredited.

I.I.P.M.M. will charge a fee for each monitoring visit. In cases where additional visits are necessary, extra fees will be charged.

Training Facilities

Employers with I.I.P.M.M. accreditation for in-house training and Instructors and Training Organisations with accreditation for training on customers' premises must ensure that the facilities provided for lift truck operator training are suitable.

Employers must provide safe premises, lift trucks and equipment.

The accredited Instructor is responsible for carrying out training in a safe manner.

The following minimum facilities are required:

- An area that is set-aside exclusively for training purposes.
- Sufficient space to carry out manoeuvring exercises on the specific truck being used for training.
- Suitable floor conditions – solid, level and pothole free.
- Adequate headroom to allow for stacking to at least 3m high.
- Adequate lighting (daylight and/or artificial lighting).
- Freedom from noise and other distractions.

In addition, the following items must be available:

- The Lift Truck must be in safe working condition and conform to the manufacturers original standards.
- Loads must be secure and free from hazard. They must also be within the truck's rated capacity.
- Pallets, Containers and Post Pallets must be in sound condition and suitable for stacking.
- Racking must be in good condition and erected in compliance with the SEMA Code of Practice.
- A small room should be available for theory sessions. This may be an office or other facility to accommodate the number of people involved including the Instructor.
- Suitable Training Aids should be available, such as, Overhead projector, Video, etc.

Note that these are minimum requirements.

Course Documentation

Applicants for registration must provide full details of each operator training course for which accreditation is being sought.

In producing a training course, applicants should give careful consideration to and include the following stages of course design:

- Trainee specification – level of skill.
- Course Title.
- Course Objectives.
- Duration of Course.
- Preparation of a Block Syllabus.
- Preparation of a Detailed Syllabus.
- Course Timetable.
- Maximum Ratio of – Trainees : Truck : Instructor.

Notes:

1. The Trainees' specification should state the level of experience of the trainees at which the course is targeted, e.g. "Novice", "Experienced Operator", "Trained & Certified Operator" etc.
2. A Basic Training Course must include essential theory sessions to include:- "Operator's Legal Responsibilities", "Fork Truck Stability", "The Operator's Safety Code", etc.
3. Each course should allow adequate time for practical training so that each trainee can reach the required level of operating ability to achieve the course objectives.

Practical Testing

The standards of the Practical Skills Tests will generally be in line with those adopted by existing accrediting bodies and published in 2000.

Certificates of Basic Training

Applicants must supply a specimen of the "Certificate of Basic Training" that will be issued to successful trainees. This specimen should state the trainee's name, the dates on which training was carried out, the date that the test was completed, the type and capacity of the forklift on which the training was conducted and the Instructor's/Examiner's name and registered number.

Under circumstances where the Instructor has had to devise an alternative test to the Approved Test, certificates issued should not refer to the Approved Test. They should instead state that the individual has (for example) "passed an Appropriate Practical Test of Basic Operating Skills designed to suit the requirements of the application".

Certificates of Authorisation

Employers should issue each employee with a Certificate of Authorisation to operate specific machines on their premises.

Only employers may issue written authorisation to operate, and this should only be issued after successful completion of Basic Training, Specific Job Training (further "off the job" training, dealing with the employer's specific needs) and Familiarisation Training ("on the job" work under supervision).

Industrial Truck Groupings

The range of different types of Industrial Truck in use in Factories and Warehouses is wide and varied. However, the types of vehicle to which this document refers are:

Group	Operator	Power	Type
C1	Rider	Electric/ICE	Counterbalanced to 4T.
C2	Rider	Electric/ICE	Counterbalanced to 15T.
C3	Rider	Electric/ICE	Counterbalanced over 15T.
R1	Rider	Electric	Reach Trucks.
R2	Rider	Electric	Pallet Stackers.
R3	Rider	Electric	Pallet Trucks - Low Level Order Pickers.
F1	Rider	Electric/ICE	4-way Combination Trucks.
S1	Rider	Electric/ICE	Sideloader to 4T.
S2	Rider	ICE	Sideloader over 4T.
N1	Rider	Electric	Narrow Aisle Turret Truck Man up.
N2	Rider	Electric	Narrow Aisle Turret Truck Man down.
N3	Rider	Electric	High level Order Picker.
T1	Rider	ICE	Counterbalanced Rough Terrain.
T2	Rider	ICE	Telescopic Handler.

Industrial Truck Groupings

Group	Operator	Power	Type
P1	Pedestrian	Electric	Counterbalanced Forklift.
P2	Pedestrian	Electric	Pallet Trucks.
P3	Pedestrian	Electric	Misc. Platform Trucks.
P4	Pedestrian	Electric	Pallet Stackers.

Notes:

1. Rider operated may be sit-on or stand-on.
2. Trucks with optional rider or pedestrian operation are classed as rider operated.
3. Low Level is defined as not exceeding 2.5m.
4. The addition of attachments may alter the classification of a truck, e.g., the fitting of a Tri-lateral head will alter a Counterbalanced Forklift to a Turret Truck.

Code of Professional Conduct

The primary function of all members on the Institute's Register of Approved Training Providers is to improve the quality and standards of training for Industrial Vehicle Operators, Instructors and others associated with the operation and control of Industrial Vehicles.

All members will undertake to:

- Ensure that no action or omission on their part or within their sphere of activity or influence is detrimental to the quality and standards of training.
- Take every reasonable opportunity to maintain and improve their professional knowledge and competence in the field of Industrial Vehicles.
- Present themselves and their facilities for inspection and monitoring by representatives of the Organisation at appropriate times.
- Assist in the activities and investigations of the recognised monitoring body and to take part in any enquiry resulting from such investigations.
- Refuse to accept any commission or order to carry out training of which the member is not competent to undertake.
- Respect confidential information gained in the course of professional activities and undertaking and refrain from disclosing such information without the consent of the client. An exception to this rule occurs where the disclosure is required by law or by an order of the court.
- Refuse to accept any gift, favour or hospitality, which might be interpreted as seeking to exert undue influences to obtain preferential considerations.

Code of Professional Conduct continued:

All members will undertake to:

- Have regard to the workload of, and the pressures on, professional colleagues and subordinates and to take appropriate action where these are seen to be such as to constitute abuse of the individual member and/or to jeopardise the safety standards of practice.
- Support the improvement of the quality of the operation of Industrial Vehicles by assisting with the provision of information that may benefit the manufacturers of these machines and by co-operating in safety audits and competitions designed to improve the safety and status of the operators.
- Ensure that all activities of the Institute and its members shall be conducted without prejudice to ethnic origins, religious or political beliefs, age, sex, colour or social status.
- To report any legal proceeding against themselves, which may affect their standing within the Institute in any way, or in any way damage the image or property of the Institute.
- Submit to any disciplinary procedures that may be instigated by the Institute and accept the findings of the Institute, having been made aware of all rights and appeals procedures available to members.
- To adhere to the standards of training, testing and instruction promoted by the Institute at all times.

All references to the "Institute" above refer to the I.I.P.M.M.

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