



Forklift Operation Program

Rev. April 2024



TABLE OF CONTENTS

I. POLICY	3
II. AUTHORITY.....	3
III. SCOPE	3
IV. RESPONSIBLY	3
PROGRAM ADMINISTRATOR.....	3
FLEET SERVICE	3
MANAGEMENT.....	4
FORKLIFT OPERATORS	4
V. PROGRAM	4
Operating Instructions	4
A. Pre-Operation Inspections.....	4
B. Carrying Loads.....	5
C. Operation Procedures.....	5
D. Traveling.....	6
E. Changing Propane Cylinder	6
F. MAINTENANCE	6
TRAINING.....	7
VI. RECORDKEEPING	7
VI. ADDITIONAL REFERENCES	8
APPENDIX A: AUTHORIZED FORKLIFT OPERATORS	9
APPENDIX B: FORKLIFT OPERATOR TRAINING, EVALUATION AND CERTIFICATION.....	10
APPENDIX C: FORKLIFT PRE-OPERATION INSPECTION CHECKLIST	11

I. POLICY

The written Forklift Operation Program establishes guidelines for City of Redlands employees to follow while operating powered industrial trucks, hereinafter referred to as “forklifts”. The rules are established to:

- A. Provide a safe working environment;
- B. Govern operator use; and
- C. Ensure proper care and maintenance of forklifts.

II. AUTHORITY

California Code of Regulations, Title 8, Sections:

3650 (Industrial Trucks)

3653 (Seat Belts)

3660-3664 (Rated Capacity, Brakes, Internal Combustion Engines, Maintenance, Operating Rules)

3668 (Operator Training)

III. SCOPE

This program applies to all City forklift operators.

IV. RESPONSIBILITY

PROGRAM ADMINISTRATOR

The Forklift Operation Program Administrator is Risk Management. The Program Administrator will be responsible for the following:

- A. Review and revise the Program:
 - 1. On an annual basis;
 - 2. When changes occur to the California Code of Regulations, Title 8, that prompt revision of this document;
 - 3. When operational changes occur that require a revision of this document; and
 - 4. When there is an accident or near miss that relates to this section.
- B. Facilitate or coordinate training for all forklift operators.
- C. Facilitate or coordinate equipment evaluations for all forklift operators.
- D. Maintain training and evaluation records.
- E. Respond to inquiries from City employees regarding the Forklift Operation Program.

FLEET SERVICES

- A. Purchase forklifts that meet ANSI/ITSDF standards.
- B. Maintain inspection/maintenance records for at minimum three years.
- C. Ensure forklifts are capable of safe and reliable operation after any major repair or design modification.

- D. Complete a receiving or delivery inspection whenever the City of Redlands purchases a new forklift.

MANAGEMENT

- A. Supervisors are responsible for enforcing the follow through of this program.
- B. Supervisors shall ensure that the assigned operators conduct and document the daily pre-shift inspections prior to using forklifts.
- C. Maintain daily operation inspection records.
- D. Ensure that all employees under their supervision (including new hires) have received appropriate training and evaluation.
- E. Coordinate with Program Administrator for training and evaluation.
- F. Coordinate with Program Administrator to review any identified hazards or assess any concerns regarding the Forklift Operation Program.
- G. Should an incident occur, complete a Report of Employee Injury or Incident form and any additional documentation needed to investigate work related injuries and illnesses.

FORKLIFT OPERATORS

- A. Do not operate the forklift without proper training and a current certification from designated trainer.
- B. Perform pre-operation inspection of the forklift prior to operation and turn in Pre-Operation Inspection checklist to designated location.
- C. Place red or “out-of-service” tag on the forklift’s steering wheel and immediately notify their supervisor if there is any condition affecting the safety or operation of the equipment.
- D. Do not operate equipment or remove an “out-of-service” tag until the safety concern has been corrected.
- E. Report any deficiencies or issues with the equipment immediately to their supervisor for repair/servicing. Do not tamper with the equipment.
- F. Do not use malfunctioning equipment.
- G. Maintain good housekeeping and do not abuse the equipment.
- H. Comply with departmental instructions and procedures for checking equipment in/out.
- I. Follow all rules and procedures pertaining to this Program.
- J. Report all forklift incidents/accidents to their Supervisor immediately.

V. PROGRAM

OPERATING INSTRUCTIONS

- A. Pre-Operation Inspection
 1. Employees shall inspect the forklift and complete the Pre-Operation Inspection checklist (see Appendix C) prior to operating equipment. The checklist shall be turned into a designated location.
 2. Attention shall be given to proper functioning of the tires, horn, lights, controls, brakes, steering mechanism, cooling system, and the lift system.

3. Any safety defects shall be noted on the inspection checklist and immediately reported for repair. Place a red or “out-of-service” tag on the forklift’s steering wheel. The tag shall not be removed, and the equipment shall not be placed in service until the safety issue has been corrected.
4. Inspection checklists shall be kept/maintained by the department with the assigned forklift(s). Inspection checklists will be kept for at least one year or until the noted issues have been corrected, whichever is longer.

B. Carrying Loads

1. Do not exceed the equipment’s rated load capacity.
2. Loads should be safely arranged, stable, and centered. Forks should be spread as wide apart as possible and locked in place. Loads of excessive width, length or height shall be balanced, braced, and secured as to prevent tipping/falling.
3. When carrying a load downgrade, travel with the load trailing. Travel with the load first when traveling upgrade. Tilt forks slightly upward.

C. Operating Procedures

1. Only authorized and currently certified personnel may operate the forklift. A trainee may operate the forklift only under the direct supervision of a designated trainer, and where such operation does not endanger the trainee or other personnel.
2. Before operating the forklift, inspect the equipment thoroughly using the Forklift Pre-Operation Inspection checklist.
3. Equipment shall not be operated with a leak in the fuel system.
4. Operators must always wear a seatbelt.
5. Passengers are not permitted, unless the forklift has an extra seat that allows the passenger to buckle-up while riding.
6. Lounging, meddling, or horseplay on or around the forklift is not permitted.
7. Do not allow anyone to stand or walk on/underneath the forks.
8. Do not elevate anyone with the forklift.
9. Do not drive up to anyone standing in front of a fixed object such that the person could be caught between the equipment and object.
10. Keep all body parts within the confine of the equipment.
11. The overhead guard and load backrest must be in place for protection against falling objects.
12. Operate the forklift with care and only for the purpose intended. Before starting or backing, look and be sure others are clear.
13. Do not operate the equipment on floors or surfaces that will not safely support the weight of the equipment.
14. Never operate the forklift without being in the driver’s seat.
15. When leaving the equipment unattended, fully lower the forks/load, engage the parking brake, turn off the engine, remove the key, and turn off the propane tank.
16. When parking on an incline, the wheels must be blocked/chocked. Do not block walkways, roadways, or emergency access areas.

D. Traveling

1. When traveling with or without a load, the forks shall be retracted back and raised as high as necessary to clear the road surface, but no higher than six inches from the ground.
2. Follow all traffic regulations. Do not exceed the posted maximum speed limit (10 mph while in the yard roads) and yield to pedestrians at all times.
3. Adjust speed according to conditions of the road. Always keep the forklift under control to safely stop in an emergency.
4. Look in the direction of travel and keep a clear view of the path of travel.
5. Avoid running over loose objects in the roadway.
6. Maintain a safe distance, approximately three truck lengths, from the vehicle ahead.
7. Sound the horn when approaching workers, intersecting aisles, blind corners, or swinging doors.
8. 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 travel with the load trailing.
9. Do not pass another vehicle traveling in the same direction, particularly at intersections, blind spots, or other dangerous locations.
10. Avoid quick starts and sudden stops and turns.
11. Never turn sideways on an incline. This can cause the equipment to tip over.

E. Changing Propane Cylinder

1. Empty propane cylinders are exchanged by a contracted vendor on an as needed basis. Employees are not permitted to transport the cylinders in a vehicle or to fill/refuel the cylinders.
2. Cylinders not in use shall be chained/secured and properly stored to prevent tip over.
3. Propane cylinders shall be replaced per the manufacturer's instructions and shall only be handled by trained and authorized employees.
4. Maintenance and replacement of the cylinders will be done by the department with the assigned forklift(s).

F. Maintenance

1. Repairs should only be made by authorized personnel.
2. If there is a condition affecting the safety or operation of the vehicle, the operator shall place an out of service or "do not operate" tag on the forklift's steering wheel to warn other personnel from operating the equipment. The tag shall not be removed, and the equipment shall not be put back in service, until the repair has been made.
3. Work Requests will be submitted to the Facilities Management for servicing or repair. Facilities Management will contact an outside vendor to complete the repair, if needed.
4. Unless power is necessary for testing and repair, power sources shall be disconnected and stored energy shall be discharged before working on the primary electrical system.
5. All replacement parts shall be equivalent in safety to the originals.
6. The equipment shall not be altered or modified, unless approved by the manufacturer.

7. Repairs to the fuel and ignition system which involve fire hazards shall only be done in locations safe for such repairs.
8. Employees shall not work underneath elevated portion of the equipment unless the equipment is properly supported to prevent falling or movement.
9. Forklifts should be in clean condition; free of excess oil and grease.

TRAINING

- A. Employees must satisfactorily complete training and be certified by a designated trainer before being authorized to operate the forklift.
- B. Employees who received forklift operator training through a prior employer must complete initial training.
- C. Employees who were trained or certified on a different type of forklift than the type they are assigned to use are required to complete training on the “new” equipment. The training only needs to include the practical and operator’s performance evaluation, unless the trainer determines that the lecture portion also needs to be included.
- D. Operator training, evaluation and certification shall be conducted by designated personnel who have the knowledge, training, and experience to train forklift operators and evaluate their proficiency.
- E. A designated trainer will provide training. A department can request training for an employee by contacting Risk Management.
- F. Initial and refresher training will be provided as outlined in Appendix B. Training will consist of classroom lectures, written tests, demonstrations by the trainer, hands-on equipment operation, or practices, and trainer evaluation of the trainee’s performance. Upon successful completion of training. Employees will be certified by the trainer and be issued a certification card.
- G. Operators must be recertified at a minimum of every three years.
- H. Refresher training is determined by Risk Management and may be triggered by any of the following situations:
 1. If the operator is involved in an accident or a near-miss accident;
 2. If the operator has been observed driving the vehicle in an unsafe manner;
 3. When the operator is assigned to a different type of truck for which he/she is not currently certified; or
 4. When there are changes in the workplace that could affect the safe operation of the truck. This could include a different type of paving, narrowed aisles, or restricted visibility.

VI. RECORDKEEPING

- A. Fleet Service will maintain all maintenance/repair and inspection records related to the forklift for at least three years pursuant to the California Code of Regulations, Title 8, Section 3668.
- B. All training records prepared in association with the Forklift Operation Program will be maintained by Risk Management for at least three years pursuant to the California Code of Regulations, Title 8, Section 3668.

VII. ADDITIONAL REFERENCES

<https://www.dir.ca.gov/title8/sb7g4a25.html>

Appendix A

Authorized Forklift Operators

The following City employees have been trained in the safe operations of industrial trucks pursuant to CCR Title 8 Section 3668 and are hereby authorized to operate such vehicles.

Operator Name	Training Date	Trainer	Evaluation Date	Evaluator	Authorized Type

- Refresher training will take place when:
1. The operator has been observed to operate the vehicle in an unsafe manner;
 2. The operator has been involved in an accident or near-miss incident;
 3. The operator has received an evaluation that reveals that the operator is not operating the truck safely;
 4. The operator is assigned to drive a different type of truck; or
 5. A condition in the workplace changes in a manner that could affect the safe operation of the truck.

All operators will be evaluated on a three-year basis to ensure operator competency.

Appendix B

Forklift Operator Training, Evaluation and Certification

In accordance with CCR Title 8, General Industry Safety Orders, Section 3668, Powered Industrial Truck Operator Training, the requirements for initial training, refresher training, evaluation and certification are outlined below:

Initial Training

1. Topics Related to the Truck
 - a. Operating instructions, warnings, and precautions for the type(s) of truck the operator will be authorized to operate.
 - b. Differences between the truck and an automobile.
 - c. Truck controls and instrumentation:
 1. Where they are located;
 2. What they do; and
 3. How they work.
 - d. Engine or motor operation.
 - e. Steering and maneuvering.
 - f. Visibility (including restrictions due to loading).
 - g. Fork and attachment adaptation, operation, and use limitations.
 - h. Vehicle capacity.
 - i. Vehicle stability.
 - j. Any vehicle inspection and maintenance that the operator will be required to perform.
 - k. Refueling and/or charging and recharging of batteries.
 - l. Operating limitations.
 - m. Any other operating instructions, warnings, or precautions listed in the operator's manual for the type(s) of vehicle that the employee is being trained to operate.
2. Topics Related to the Workplace
 - A. Surface condition where the vehicle will be operated.
 - B. Composition of loads to be carried and load stability.
 - C. Load manipulation, stacking, and restacking.
 - D. Pedestrian traffic in areas where the vehicle will be operated.
 - E. Narrow aisles and other restricted places where the vehicle will be operated.
 - F. Hazardous locations where the vehicle will be operated.
 - G. Ramps and other sloped surfaces that could affect the vehicle's stability.
 - H. Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a build-up of carbon monoxide or diesel exhaust.
 - I. Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

Appendix C

FORKLIFT PRE-OPERATION INSPECTION CHECKLIST

Operator Name _____ Date _____

Vehicle # _____ Hour Meter Reading _____

Operator: Perform pre-operation inspection at start of task or prior to operating equipment. Note general vehicle condition. Clear away all collected debris. Check for mechanical damage and loose or leaking components.

Before starting engine check the following:

Visual Inspection	Status	Remarks	Date Corrected
Warning decals, capacity plate, etc. are legible	OK		
Forks/locking pins, carriage, mast (physical damages)	Service Needed?		
Lift system (hydraulic lines, chains, etc.)	_____	_____	_____
Wheels, Tires & Lug Nuts (condition/pressure)	_____	_____	_____
Engine (check oil level and for leaks)	_____	_____	_____
Transmission (check oil level and for leaks)	_____	_____	_____
Engine belts (check for adjustment/w ear)	_____	_____	_____
Air cleaner	_____	_____	_____
Radiator (check coolant level)	_____	_____	_____
Hydraulic tank (check oil level & for leaks)	_____	_____	_____
Fuel tank (secured, fuel level, connections, hoses, leaks)	_____	_____	_____
Overhead guard (no damage)	_____	_____	_____
Seat belt	_____	_____	_____
Other (loose, damaged or missing parts)	_____	_____	_____

After starting engine check the following:

Visual Inspection	Status	Remarks	Date Corrected
Engine (does it sound normal)	OK		
Instruments (check for normal readings)	Service Needed?		
Exhaust system (check for leaks & excessive smoke)	_____	_____	_____
Wipers, lights & signals	_____	_____	_____
Horn & back-up alarm	_____	_____	_____
Lift system (lift, tilt, side shift)	_____	_____	_____
Transmission & clutch (direction & speed range)	_____	_____	_____
Brakes	_____	_____	_____
Steering	_____	_____	_____

Note anything abnormal or in need of repair:

Equipment must be tagged out if there is any condition affecting the equipment's safety or operation.