

INDEX 

<b>Health and Safety Executive</b>		<b>Sector Information Minute</b>	
<b>Agriculture and Food Sector</b>		<b>SIM 01/2002/02</b>	
<b>Cancellation Date</b>	19/02/2006	<b>Open Government Status</b>	Fully Open
<b>Version No &amp; Date</b>	1: 19/02/2002	<b>Author Unit/Section</b>	FOD Agriculture & Wood

Target Audience  
All HSE Inspectors

## INDUSTRY CODE OF PRACTICE FOR OPERATOR TRAINING IN AMENITY HORTICULTURE AND SIMILAR ENVIRONMENTS

This SIM informs inspectors of the work by the British Agricultural and Garden Machinery Association (BAGMA) with industry to produce a code of practice for the training of operators of machinery in amenity horticulture and similar environments such as sports turf.

### BACKGROUND

1 BAGMA have been developing ways to increase machinery dealerships role in the training of operators beyond simply handing over machinery to the new user. They consulted with manufacturers, contractors, training providers and HSE and have produced an industry code of practice.

2 The code was launched in September 2001 at the SALTEX exhibition. HSE attended the launch and the Chief Inspector of Agriculture sent a letter of support.

### ACTION BY INSPECTORS

3 Inspectors should note the content of the code ([see appendix !\[\]\(cf531ed27e91483460120fcc057b3901\_img.jpg\)](#)) and should consider the code to give an example of good practice. Inspectors may also wish to refer to the code when serving enforcement notices or as evidence to support prosecutions.

4 Employers who follow the code should be considered to meeting some of the requirements of the Provision and Use of Work Equipment Regulations 1998 and in particular duties to provide training of users.

5 Inspectors should note that only operators that have attended an assessed training course and have passed could be considered to be competent.

Date first issued: 19 February 2002

TOP 

# **National Code of Practice – Operator Training & Assessment Scheme**

**For operators of tractors and machinery in / on:**

Amenity Horticulture

Artificial Surfaces

Golf Course

Landscape Industries

Sports Turf

**National Code of Practice and guidance for operators of tractors and machinery in / on the amenity horticultural, artificial surfaces, golf courses and sports turf industries.**

**Developed in consultation with the Health & Safety Executive**



**National Code of Practice - Operator training and assessment scheme**

## **National Code of Practice Operator Training & Assessment Scheme**

**National Code of Practice and guidance for operators of tractors and machinery in / on the, amenity horticultural, artificial surfaces, golf courses, landscape and sports turf industries.**

The range of tractors and machinery covered by the National Code of Practice are used in / on the following areas:

Amenity Horticulture

Artificial Surfaces

Golf Course

Landscape Industries

Sports Turf

### **Acknowledgements**

The British Agricultural and Garden Machinery Association (BAGMA) gratefully acknowledges the help given by the following organisations in the development of this National Code of Practice.

BIGGA

Brophy

GTC

Health & Safety Executive

HSS Groundcare

IOG

John Deere Ltd

Lantra Awards

Lantra NTO

National Proficiency Test Council

Swan Plant Hire Services

Textron Turf Products

## National Code of Practice - Operator training and assessment scheme

### Preface

Every year there are about 3000 reportable injuries involving tractors and machinery. These injuries, some fatal, create suffering for those involved and their dependants. They also involve a heavy cost on the employer's business. Even an incident not involving injury may result in costly damage buildings, fittings and goods.

Tractor and machine accidents are frequently associated with lack of suitable and sufficient operator\* training. Such training is an essential first step in reducing damage and injury.

*\*For the purpose of this document an operator is anyone who operates a tractor and/or machine, even as a secondary or occasional part of their job, and is not limited to people specifically designated as tractor and machine operators*

The training of tractor and machine operators may be divided into two stages:

<b>Section 1</b>	<i>Installation / Familiarisation training</i>	Instruction on controls and operation of tractors and machinery. (handover / installation procedure)
<b>Section 2</b>	<i>Operator training</i>	Detailed training on the use of tractors and machinery. Instruction is provided by qualified people (Operator Training)

These stages can be taken quite separately, or they may be combined or integrated depending on the role of the operator. In either case, it is essential that each stage be covered fully, with due regard to the experience, if any, of the trainees and the type or types of tractor or machine they will be expected to operate.

### Aim of the National Code of Practice

The aim of the National Code of Practice is to ensure that operators of tractors and machinery are competent to work with tractors and machinery in whatever area of work is undertaken within the boundaries of the manufactures handbook.

There are three levels of training and assessment provision:

- 1) Installation / Familiarisation Training
- 2) Integrated Training and Assessment
- 3) Separate Training and Assessment.

## **National Code of Practice - Operator training and assessment scheme**

### **1) Installation / Familiarisation Training**

This procedure is to be followed when any type of machine is delivered to a new owner. A range of basic instructions will be issued when the supplying company installs the machine

The basic safe operation of a machine will be highlighted to the operator. It is recommended that **Section 3 Operator Training** be undertaken by all before the machine is installed.

The Installation / Familiarisation Course is a non assessed course. The person handing the machine should have relevant knowledge of the machine and its operation, i.e attended a suppliers training course on the technical detail of the product. No formal training qualifications are required.

### **2) Operator training – Integrated Training & Assessment**

This should be undertaken by operators who regularly use and operate tractors and machinery for work purposes. This training should be taken by all operators of all machines. The installation / familiarisation training will account for the individual types of machines each operator is using on a daily basis.

Integrated Training & Assessment is when an operator is trained and assessment by the same person during a training event.

Any instruction given should be completed by persons who have the relevant experience and qualifications to deliver, train and assess operators on the relevant tractor or machine.

### **3) Operator Training – Separate Training & Assessment**

This should be undertaken by operators who regularly use and operate tractors and machinery for work purposes. In this instance the training course and assessment is carried out separately at different times and by different people. One person cannot train and assess the same operator.

Separate assessment is taken once an operator is satisfied that the assessment criteria can be fulfilled. A separate training course maybe undertaken before the assessment. The National Proficiency Test Council provide assessment mechanisms for a wide range of machinery used in the , amenity horticultural, artificial surfaces, golf courses and sports turf industries.

#### **For all sections:**

To comply with their duties under the *Provision and Use of Work Equipment Regulations 1998* and general duties under the Health and Safety at Work Act 1974 employers must ensure that all operators they employ, both new and existing, are adequately trained and, when necessary, provide for their additional or refresher training.

## National Code of Practice - Operator training and assessment scheme

### Overview

The National Code of Practice (COP) and guidance relate to all types of Tractors and Machines.

Anyone driving a tractor or machine on the public highway must comply with the appropriate road traffic legislation.

The COP and guidance have been agreed by the Health and Safety Executive following widespread consultation. They give practical advice to help employers meet their legal obligations under the Provision and Use of Work Equipment Regulations 1998 to ensure that all operators receive adequate training for purposes of health and safety.

For convenience, any text from the Regulations is included in *italic* type.

### Example of the Record of Machine Familiarisation / Installation Training

Record of Machine Familiarisation / Installation Training	
The following 20-point check has been carried out before handover to the following operator(s) on the machine(s) listed below in accordance with the Code of Practice - Operator Training & Assessment 2001.	
This record also helps to provide evidence of training provision under <i>Provision and Use of Work Equipment Regulations 1998</i> and general duties under <i>the Health and Safety at Work Act 1974</i> .	
A full relevant operator-training course should be undertaken before using the machine listed below.	
1. Pre start checks	11. Safety Guards
2. Starting & Stopping procedures	12. Seat fixing and adjustment
3. Hand Brake and Brake operation	13. Personal protective equipment
4. Safe stop procedure	14. Safety signs and lights
5. Levers and controls	15. Procedures on slopes
6. Lights, Reflectors, Indicators & Flashing Beacons	16. Safety interlock procedures
7. Machine adjustment & Maintenance	17. Safe systems of work
8. Warning devices	18. Operator Manual Awareness
9. Tyre condition and wheel fixings	19. Operator responsibilities
10. Steering mechanisms	20. Vibration & noise levels
has received installation / familiarisation training on	
I have received installation / familiarisation training on the above machine and all 20 points have been fully explained to me. I have been made aware of the operator's manual.	
Operators name:	Signature:
Skills ID Card Number:	Installation Date:
Installation trainers name:	Signature:
Company:	
Copies of the National Code of Practice – Operator Training & Assessment can be obtained from <a href="http://www.bagma.com">www.bagma.com</a>	



## National Code of Practice - Operator training and assessment scheme

### Section 1

## The Code of Practice – Tractor and Machine Operator Training

### National Code of Practice Introduction

1. This National Code of Practice (COP) relates to the provision of basic training for tractor and machine operators. It has been produced in consultation with representatives of The British and Garden Machinery Association, Institute of Groundsmanship, Lantra NTO, HSE and National Proficiency Test Council, BIGGA, GTC.

### What is covered?

2. The COP covers Tractors and Machinery used in any public places, on or off road. The purpose of this coverage is to include all types of tractors and machinery having similar training requirements and to which the advice can reasonably be applied.

### Applicable Legislation

#### Regulation

3. Regulation 9 of the Provision and Use of Work Equipment Regulations 1998 (PUWER) requires that:
  - 1) *Every employer shall ensure that all persons who use work equipment have received adequate training for purposes of health and safety, including training in the methods which may be adopted when using the work equipment, any risks which such use may entail and precautions to be taken.*
  - 2) *Every employer shall ensure that any of his employees who supervises or manages the use of work equipment has received adequate training for purposes of health and safety, including training in the methods which may be adopted when using the work equipment, any risks which such use may entail and precautions to be taken.'*
  - 3) *Regulation 3 of PUWER 1998 extends the requirements of the Regulations to apply to the self employed and those who have control (to the extent that their control allows) of work equipment, people at work who use, supervise or manage the use of work equipment, or the way in which work equipment is used at work.*

### Obligation to provide basic training

4. Employers should not allow anyone to operate, even on a very occasional basis, tractor or machines within the scope of this COP who have not satisfactorily completed basic training and assessment as described in this COP, except for those undergoing such training under adequate supervision or employed by a dealer or service department involved in the maintenance of tractors and machinery. They should have completed at least the installation training course.

## **National Code of Practice - Operator training and assessment scheme**

### **Selection of instructors**

5. When arranging for training, employers should satisfy themselves that it is in accordance with this COP. Operator training should only be carried out by instructors who have themselves undergone appropriate training in instructional techniques and skills' assessment. They should give instruction only on the types of tractors and machinery for which they have been trained and successfully assessed as operators. Instructors also need sufficient industrial experience to enable them to put their instruction in context and an adequate knowledge of the working environment in which the trainee will be expected to operate.

Membership of the Lantra Professional Register or other such registers provides adequate recognition of training delivery methods.

### **Training area and facilities**

6. Operator, Installation or specialist training may be given at a suitable training centre or venue, or on an employer's premises. Where practicable, training areas should be sheltered from adverse weather conditions.
7. Operator training needs to be carried out off the job. Even when conducted on an employer's premises this means that the instructor and trainees, together with the tractors and machinery, should be wholly concerned with training, kept away from normal commercial operations, and not be diverted to other activities while training is in progress. Tractors and machinery used for training must be in good mechanical condition, properly maintained (taking into account manufacturers' recommendations), conform to all legal requirements and be suitable for the particular uses to which they will be put.
8. Suitable manoeuvring area should be provided and appropriately marked. While training is in progress access to this area should be restricted to the instructor and trainees. The area will need to include facilities for simulating the manoeuvring space likely to be encountered in the workplace, including slopes.
9. A training room or other suitable accommodation, together with appropriate training aids (eg projectors, models) should be made available to enable the instructor to cover, under reasonable conditions, the principles of tractor and machine operation.

### **Training structure and content**

10. All instructors should have adequate experience of the product there are providing. Membership of recognised registers, such as the Lantra Professional Register ensures minimum experience levels and continued training of instructors. Appendix 4 outlines the minimum requirements for instructors of the training courses
11. Training should be largely practical in nature and of sufficient length to enable trainees to acquire the basic skills and knowledge required for safe operation, including knowledge of the risks arising from tractor and machine operations. It should not be altered to suit immediate operational or production needs.
12. The ratio of trainees to instructors needs to allow each trainee adequate time to practise operating the tractor or machine under close supervision and to

## National Code of Practice - Operator training and assessment scheme

prepare for the practical tests. For **installation training** a ratio of 1 trainer to 30 students in a classroom style presentation would be acceptable. whereas **operator training** a maximum ratio of 1 instructor to 6 trainees would be suggested with training and assessment.

13. Training should follow a carefully devised programme which ensures that each stage is introduced in an appropriate sequence, building on what has gone before, and allowing adequate time for learning and practice before the next stage is tackled. Easier skills should be dealt with before progressing to more difficult operations. At each stage the instructor will need to explain and demonstrate safe operation, which should then be practised by the trainees under direct supervision.
14. Basic training should be given on all the types of tractors and/or machinery that operators will or could be required to use in their work. If the operator is subsequently required to operate another type of tractor or machine, practical conversion training will be required. Employers should also consider the need for conversion training where the tractor and / or machine type does not change, but the size alters significantly.
15. The course content will depend upon the tractor and machine operations the trainee will be expected to carry out. The objectives of an installation course, some of which are listed in Appendix 1, need to be tailored to fit all the tractor and machine operations to be undertaken by the operator.

### Assessment

16. The instructor should assess a trainee's progress continuously to ensure that the required standards are achieved at each stage of basic training. Formal External Assessment can be carried out upon completion of the training course or an integrated training and assessment route maybe chosen. For N/SVQ purposes separate assessment should be carried out.**Records**
17. Employers, or a independent third party, need to keep a record for each employee who has received training and / or assessment at whatever level.

**Section 2 -  
Guidance on General Aspects of training**

**Introduction**

18. The employer's duty under the Provision and Use of Work Equipment Regulations 1998 to provide training extends to operators of all other types of tractor or machine. The advice given in the COP and guidance can be used as an indication of the standard of training to provide for all types of tractor and machine. The guidance can be of help not only to employers, but also to organisations offering training for operators and instructors, and to tractor and machine suppliers.
19. Safe operation of any tractor or machinery requires proper training. It is quite wrong to assume that because employees hold a licence to drive, say, a motor vehicle on the public roads, they also have the skills necessary to operate a tractor or wheeled vehicle.
20. Employers are responsible for ensuring that adequate training is provided for their employees. Employers should satisfy themselves that any training given covers all aspects of the work to be undertaken and takes account of this guidance, and in the case of basic training, is at least to the standard of the COP. Self-employed tractor and machine operators also have responsibilities under the Provision and Use of Work Equipment Regulations 1998 to ensure they undergo the same type of training, achieving the same standard, as employers are required to provide to their employees.
21. Employers also have a continuing responsibility to provide adequate supervision and it is therefore essential that supervisors themselves have sufficient training and knowledge to recognise safe and unsafe practices. This does not mean that supervisors need full operator training, but they do need to understand the risks involved, and the means of avoiding or counteracting them. Training in health and safety management, risk assessment and safe systems of work should be considered.
22. Employers should ensure that employees (eg lorry drivers, maintenance or service technicians) who use the tractor or machine on other people's premises are trained to do so and meet the requirements of the specialist training requirements and are able to demonstrate this, this will be covered by the Installation Training guidance procedure., and that information to this effect is made available to controllers of those premises. Information provided could be documentation on an individual basis or written assurance that all their employees who will visit the site and be expected to operate tractors or machinery are trained and competent to do so. Employers should use this information to satisfy themselves, before allowing use of tractors and machinery, that visitors have been adequately trained to safely operate the lift tractor or machine(s) to be used.
23. Employers who do not control worksites where their employees may operate tractors and machinery and those who do control such sites need to co-ordinate their efforts and co-operate to ensure that only people trained as described in the COP and guidance are allowed to operate tractors and machines. Such co-ordination and co-operation is equally important on multi-occupied sites, such as business parks and markets where tractors and machines may be shared. The responsibility of those who control worksites to

## National Code of Practice - Operator training and assessment scheme

ensure that the workplace is safe in no way detracts from the employer's duty to ensure that their own employees are adequately trained.

24. Employees also have responsibilities. **Section 7 of the Health and Safety at Work etc Act 1974** requires them to take reasonable care for their own health and safety and that of other people. They must also co-operate with their employers to assist them in complying with their statutory duties. **Section 8 of the Health and Safety at Work etc Act 1974** requires that employees should not interfere with or misuse anything provided in the interests of health, safety or welfare under health and safety legislation.

## Selection of people for training

25. Employers should select potential tractor and machine operators carefully. Those selected for training need to have the ability to do the job in a responsible manner and the potential to become competent operators. Young persons (under 18 years of age) are often exposed to risks to their health and safety when using work equipment as a consequence of their immaturity, lack of experience or absence of awareness of existing or potential risks. Therefore, such young people should not be allowed to operate lift tractor or machines without adequate supervision unless they have the necessary competence and maturity, as well as having successfully completed appropriate training. For more information see **The Health and Safety (Young Persons) Regulations 1997 (SI 1997 No 135)** which applies to young workers aged under 18 years and Young people at work - A guide for employers which gives guidance on the Regulations. Children under minimum school leaving age should never operate tractors and / or machinery.
26. Those selected should have the necessary level of physical and mental fitness and learning ability for the task. People with disabilities may well be able to work safely with tractors and machinery. In cases where a disability is potentially relevant to the safe operation of lift tractor or machines, employers should seek medical advice on a case by case basis. The Disability Discrimination Act 1995 may apply. For an explanation of employers' duties under this Act see the Department for Education and Employment's Code of Practice (details in Further reading section). Further information on medical considerations is given in HSE's booklet HSG6 Safety in working with lift tractor or machines (see Further reading section).
27. Where employees claim to be trained and experienced, employers should insist upon evidence. Employers need to satisfy themselves that the training, experience and ability is in fact sufficient and relevant to the lift tractor or machines and handling attachments to be used. Where evidence, such as a training certificate, is not available, employers will need to arrange assessment of the person's competence and provide any training which the assessment indicates is necessary before allowing the employee to operate a tractor or machine.

## National Code of Practice - Operator training and assessment scheme

### Section 3 - Operator Training

28. The training of operators should ideally include the two stages of training:

<b>Section 1</b>	<i>Installation / Familiarisation training</i>	Instruction on controls and operation of tractors and machinery. (handover / installation procedure)
<b>Section 2</b>	<i>Operator training</i>	Detailed training on the use of tractors and machinery. Instruction is provided by qualified people (Operator Training)

#### Installation / Familiarisation training

29. Before any machine is installed or delivered to a customer, the operator should have completed an approved operator training course on the relevant machine. The Installation / Familiarisation course is designed to update the operator on specific tractor or machine specific items.
30. Installation training needs to cover the operational controls and procedures of a tractor or machinery, including the risks arising from tractor and machine operation. to update competent operators who, should have already received a recognised training and / or assessment course.,
31. Length of training may vary depending on the objectives to be covered, the trainee/instructor ratio and the ability and previous experience of the trainees. In all cases, the time devoted to training needs to be sufficient to ensure that the installation training objectives can be achieved.
32. Operators with some experience of tractors or machines or relevant experience of similar vehicles may need less extensive training than those with no experience. However, the value of such experience should not be overestimated. An operator with Operator Training on one type of tractor or machine cannot safely operate others, for which they have not been trained.
33. Given the wide range of tractor or machines, operator experience and company requirements, some training organisations will arrange for a basic course to be tailored to meet a client's requirements. A short Installation / Familiarisation course should be undertaken before an operator is allowed to use a new type of machine.
34. The ratio of trainee: instructor: tractor or machine should enable the instructor to demonstrate each part of the practical training and the trainee to obtain adequate hands-on experience. A maximum level of 1 instructor to 30 trainees in a classroom course is recommended
35. The Installation Course is a non-assessed course.

## National Code of Practice - Operator training and assessment scheme

### Operator training

36. Operator training should take place before the installation / familiarisation course. The trainee: instructor: tractor or machine ratio for operator is 1 instructor to a maximum of 6 trainees.
37. The Operator Training Course is a lead into either integrated assessment or separate assessment.
38. Operator training will be tailored to the employer's special needs and include, where appropriate:
  - a) knowledge of the operating principles and controls of the tractor or machine to be used. Routine inspection of the tractor or machine in accordance with the operator's handbook or instructions issued by the manufacturer need to be covered, in so far as they may reasonably be carried out by the operator. This should be repeated whenever the design of tractor or machine is changed;
  - b) use of the tractor or machine in conditions that the operator will meet at work, e.g. confined areas; slopes; rough terrain and bad weather conditions;
  - c) training in the workplace to be undertaken,

### Authorisation, records and certificates

39. Following satisfactory completion of training, the employee should be given written authorisation to operate the type or types of tractor or machine for which all three elements of training have been successfully completed. Authorisations may be issued on an individual basis and/or recorded centrally by the employer. Authorisations should state the operator's name, the date of authorisation, the tractor or machines to which they relate and any special conditions, such as area limitations. Employers should not allow personnel to operate tractor or machines on any premises without authorisation (except in the case of a trainee under close supervision). Employers will also need to ensure that they are satisfied with the continuing competence of authorised operators.
40. Employers should keep adequate records for each employee who has satisfactorily completed any stage of tractor and machine training.
41. A recognised central database of trainees and their achievement record is an acceptable and recognised method of achievement storage on behalf of the trainee.

### Further operator training and monitoring of standards

42. There is no specific requirement to provide refresher training after set intervals, but even trained and experienced tractor and machine operators need to be re-assessed from time to time to ensure that they continue to operate lift tractor or machines safely.

This assessment, which should form part of a firm's normal monitoring procedure and be formally time-tabled to ensure that it is done at reasonable intervals, will indicate whether any further training is needed. In addition to routine safety monitoring, re-assessment might be appropriate where operators have not used tractor or machines for some time, are occasional users, appear to have

## **National Code of Practice - Operator training and assessment scheme**

developed unsafe working practices, have had an accident or near miss, or there is a change in their working practices or environment.

43. To enable operators to extend the range of tractor or machines they are qualified to drive, may also be appropriate and is widely available an Operators course for each of the machines being operated should be undertaken.
44. Training will not in itself ensure the competence of individuals: this will develop with experience and should be monitored. Continued supervision will be necessary to ensure that good standards of operation are maintained.

**Section 4 -  
Instructor selection and training**

45. Successful training depends on the competence of instructors. They should be asked to supply evidence of their training and post-training experience on the type of tractor or machine to be used, both as instructor and operator, and their knowledge of and familiarity with conditions in the industry where trainees will work. This will include expertise in any requirements peculiar to the operation of the tractor or machine(s) and in the work trainees will be expected to undertake. Since training is largely accomplished through demonstration followed by supervised practice, it is essential that each demonstration by the instructor is a model, free from technical errors and misjudgements. Instructors must also be able to make effective use of instructional techniques in both the working and classroom environment.

**Good instructors should:**

- a) have the ability to adapt their approach to suit the needs of different trainees;
- b) be able to communicate effectively;
- c) be able to lead and control; and
- d) keep their own training and experience as instructors up to date, especially if not training regularly.

46. An example of an instructional techniques training programme is in Appendix 6. Instructors need to be re-assessed periodically as appropriate. Such re-assessment is particularly important if instructors have not done any training for some time. Advice on instructor training can be obtained from the bodies listed in Appendix 5.

47. Re-assessment will not be needed where the instructors belong to a recognised Continuous Professional Development (CPD) which monitors product updates on a continual basis.

**Further information**

48. The Further reading section lists additional sources of information on tractor and machine training and related subjects.

**Appendix 1**  
**Items to be covered in a installation course**

Objectives of the Installation Course

To provide the operator with basic understanding on how the controls of the tractor or machine function. No participative training and assessment is given. Only a formal outline is given on machine operation.

Items to be covered

- 1) Pre start up checks
- 2) Starting & stopping procedures
- 3) Hand brake and brake operation
- 4) Safe stop procedures
- 5) Levers and controls
- 6) Lights, reflectors, indicators & flashing beacons
- 7) Machine adjustment & maintenance
- 8) Warning devices
- 9) Tyre condition and wheel fixings
- 10) Steering mechanisms
- 11) Safety guards
- 12) Seat fixing and adjustment
- 13) Personal protective equipment
- 14) Safety decals and lights
- 15) Driving procedures on slopes
- 16) Safety interlock procedures
- 17) Safe systems of work
- 18) Operator manual awareness
- 19) Operator responsibilities
- 20) Vibration & noise levels

**Appendix 2**

**Objectives to consider for inclusion in an Operator Training course**

On completion of training, the trainee should be able to do the following.

- 1) State the reasons for operator training, the risks associated with tractor and machine operations and the causes of tractor and machine accidents.
- 2) State the responsibilities of operators to themselves and others, including their duties under sections 7 and 8 of the Health and Safety at Work etc Act 1974.
- 3) Identify the basic construction and main components of the tractor or machine, stating its principles of operation.
- 4) Locate and state the purpose and method of use of all controls and instruments.
- 5) State the factors which affect machine stability, including: turning, especially related to speed and sharpness of turn; centres of gravity; and speed and smoothness of operation.
- 6) Follow correct procedures when loading, unloading vehicles and safe securing of vehicles.
- 7) Park the machine, following correct procedures and precautions;
- 8) Where applicable state the purpose, and demonstrate the procedures for the use, of safety devices including level indicators.
- 9) Carry out inspection and maintenance tasks appropriate to operators as required by the machine manufacturers and any relevant legislation.
- 10) State the actions to be taken in an emergency while in control of a tractor or machine, for example, action to be taken in the event of tipover or ingress of object into cutting mechanism.

## **Appendix 3**

### **Qualifications required by trainers / instructors / assessors**

#### **Installation Course**

- 1) A minimum of 5 years experience or evidence of industry experience on the type of tractor or machine being installed. E.g. manufactures training courses.
- 2) A member of the Lantra Professional register or equivalent register providing evidence of Continuous Professional Development.

#### **Instructors**

- 1) A member of the Lantra Professional register or equivalent register providing evidence of Continuous Professional Development.
- 2) Holds an Instructional Techniques Certificate
- 3) Holds the appropriate Assessment qualification from the Employment NTO.
- 4) Has completed the Technical Training on each type of tractor and machine.
- 5) A minimum of 5 years experience or evidence of industry experience on the type of tractor or machine being installed. E.g. manufactures training courses.

#### **Assessors**

1. An assessor should also meet the requirements set out by the relevant awarding body.
2. A minimum of 5 years experience or evidence of industry experience on the type of tractor or machine being installed. E.g. manufactures training courses

## **National Code of Practice - Operator training and assessment scheme**

### **Appendix 4: Examples of organisations competent to deliver recognised training and / or assessment courses.**

**For any organisation to deliver a training course, only a competent person will be able to deliver the courses.**

A competent person will have the following qualifications:

- 1) A recognised Instructional Techniques Training Certificate
- 2) A recognised valid Emergency First Aid Certificate
- 3) The recognised assessor qualification from the Employment NTO (not required for training course provision only)
- 4) The relevant technical skills to deliver a course on the relevant machine.
- 5) Covered by Public Liability, Professional Indemnity and Personal Liability insurance.

#### **BAGMA Training and Assessment Centres**

**Delivery** – both Training and Assessment Courses.

**Criteria** – All staff registered though BAGMA will hold all the above qualifications and also a member of the Lantra Professional Register to ensure CPD of the competent staff.

Colleges

Golf Training Committee approved centres

## Appendix 5

### Recognised accrediting bodies

49. The bodies listed below have been recognised to train instructors and/or to train, test and certificate operators. The nature and scope of their accreditation schemes are briefly described.

#### Lantra National Training Organisation Ltd

NAC, Kenilworth, Warwickshire CV8 2UG (helpline Tel: 0345 078007).

Lantra National Training Organisation Ltd provides access to training for those working in land-based and related industries. This includes a national instructor registration scheme and a national training provider registration scheme. Tractors or machines of the types used on golf courses in amenity horticulture, sports turf and landscapes industries.

#### Lantra Awards

Lantra Awards has developed a wide range of integrated training and assessment courses including integrated training & assessment courses.

Lantra Awards:

- courses are available through a national network of registered training providers, including BAGMA, and are usually run on employers' premises;
- issues certificates of basic training when operators have met training objectives;
- trains, and updates instructors

Further details can be obtained from Lantra National Training Organisation Ltd on its information services helpline, Tel: 0345 078007.

### Assessment bodies

#### The National Proficiency Test Council (NPTC)

The NPTC are not a training organisation. They are able to provide independent assessment where separate assessment is required for N/SVQ requirements.

Further details from the National Proficiency Test Council, National Centre, Stoneleigh, Warwickshire. CV8 2LG. Tel: 02476 67 65 53. Fax: 02476 69 61 28. email: [information@nptc.org.uk](mailto:information@nptc.org.uk). [www.nptc.org.uk](http://www.nptc.org.uk)

## National Code of Practice - Operator training and assessment scheme

### Appendix 6: Example of an instructional techniques training programme

The following outline programme for a tractor and machine instructor course is given as an example. Full details of instructor training courses can be obtained from the bodies listed in Appendix 5.

#### Course aims

To provide effective instruction on the following:

- (a) relevant instructional skills, including classroom technique;
- (b) techniques for structuring training material into a logical sequence;
- (c) an objective and critical approach towards the effectiveness of the instruction presented;
- (d) appropriate methods of assessment on the progress of trainees and the testing of basic skills and knowledge they acquire.

#### Course objectives

On completion of training, course members should be able to demonstrate their ability to plan, prepare and present practical and theoretical instruction to an adequate standard. In addition, they should be able to construct, conduct and mark objectively a practical test or tests of trainees' operating ability and issue appropriate documentation.

#### Course content

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>a) Principles of instruction;</li><li>b) Simple task analysis</li><li>c) Preparing a job break-down sheet</li><li>d) Planning, preparing and presenting a practical demonstration</li><li>e) Planning, preparing and presenting a practical lesson</li><li>f) Planning, preparing and presenting a classroom lesson</li></ul> | <ul style="list-style-type: none"><li>g) Use of question and answer techniques</li><li>h) Developing training courses suitable for new trainees or experienced operators</li><li>i) Guidance in specific job and installation training</li><li>j) Constructing, conducting and marking practical and theoretical tests of trainees' operating ability</li><li>k) Certification of operators after basic training</li></ul> |
|---|--|

#### Final instructor assessment

Course members should be assessed on:

- a) practical operating and instructing ability
- b) theoretical instructing ability ability to conduct and mark tests of trainees' operating ability and knowledge to an appropriate and consistent standard