

# Safety and performance from the start

There is a wind of change blowing through the turf care machinery industry as an increasing number of manufacturers and dealers recognise that there are several good commercial reasons to improve the way in which they install new machinery.

It is important to draw a clear distinction between installation and operator training. Installation is about the handover of new and used machinery to the Course Manager. It is designed to highlight the information about safe and correct operation contained in the manufacturer's handbook. Operator training is, as the name suggests, about competence to operate the machine correctly under different conditions and in different applications and, although here to safety is a key concern, the yardstick is performance.

Historically, many new machines have been 'installed' simply by leaving the manufacturer's handbook on the seat when the machine has been delivered by the dealer. Today, the sharper legal focus on employee health and safety means the supplier and the employer share a responsibility to provide far more than this.

Certainly, the handbook contains all the necessary information to do the job. Legally, it must. However, in future suppliers are likely to find it increasingly difficult to rely on the defence that a copy of the manufacturer's handbook was delivered with the machine, if an operator or someone else was injured because key information about the machine had not been effectively communicated at the point of delivery. In short providing a copy of the handbook is not a guarantee that operators will read and understand it before first operating the machine!

The British Agricultural and Garden Machinery Association (BAGMA) is the trade association for the UK's agricultural and turf care machinery dealers. It provides them with a range of business services and support to help reduce costs and promote better service to their customers. It is so concerned about both the legal and moral implications of the 'leave the handbook' approach to installation, that it has developed its own Approved Installer Scheme in conjunction with the HSE and Norwich Union.

Ian Jones, Director General of BAGMA, was keen to achieve two key objectives within the programme.

"First was to have a system that provides evidence of installation by trained, accredited installers," he says. "And second, but equally important, was to provide the training and resources they need to plan and deliver installation professionally."


The key components in the BAGMA system are a Record of Installation for each operator involved, and an Accreditation Card for all trained and tested installers which entitles them to use the system and a series of special module cards developed to help them plan and deliver installation on any machine – new or used.

The modular approach is simple to apply and highly effective. The information contained in the manufacturer's handbook is broken down into a maximum of 15 modules using a separate card for each. The modules include an introduction to the manufacturer's handbook; specific information it contains about safe systems of work; details of the principal operating systems and controls with particular reference to safety guards, interlocks, signs and warning signals; safe starting and stopping and routine maintenance that is the operator's responsibility.



The cards (see example below) use a series of open questions to help the installer plan and prioritise what to include in the installation presentation. The same cards can also act as an aide-memoir during presentation. The systematic modular approach means that it is possible to plan installation for any machine, new or old, using the same set of cards. Any cards that are not required for a particular machine, because, say, it doesn't have an engine, are simply omitted.

The BAGMA programme also focuses on presentation skills for the installers to ensure that they can effectively communicate the necessary information, whether they are presenting to groups or an individual operator. Again, the module cards can help, since many of the same questions the installer used to plan the installation material can also be used to test the operator's understanding.



### Record of Machine Familiarisation / Installation Training

The following 15 point check, developed in consultation with HSE, has been given to the operator(s) on the machine(s) listed below.

This record also helps to provide evidence of training provision under *Provision and Use of Work Equipment Regulations 1998* and general duties under *The Health and Safety at Work Act 1974*. (Please tick as appropriate or N/A if not applicable)

<input type="checkbox"/> Operator's Manual / Instructions	<input type="checkbox"/> Lights & Beacons
<input type="checkbox"/> Safe Systems of Work	<input type="checkbox"/> Warning Devices
<input type="checkbox"/> Safety Guards	<input type="checkbox"/> Pre Start Checks
<input type="checkbox"/> Safety Interlocks	<input type="checkbox"/> Tyres & Wheels
<input type="checkbox"/> Safety Signs & Lights	<input type="checkbox"/> Starting, Stopping & Safe Stop Procedure
<input type="checkbox"/> Levers & Controls	<input type="checkbox"/> Routine Maintenance & Adjustment
<input type="checkbox"/> Handbrake & Brake	<input type="checkbox"/> Operator Training Information
<input type="checkbox"/> Steering	

Name of operator \_\_\_\_\_

\_\_\_\_\_ has received Installation / Familiarisation Training on \_\_\_\_\_

Details of machine (s) \_\_\_\_\_

Any other comments

I have received Installation / Familiarisation Training on the above machine(s) and all the relevant points have been fully explained to me and I have understood them. I have access to and know how to use the operators' manual.



This is not a **driver training** course; therefore a recognised operator training course should be undertaken before using the machine/vehicle(s) listed above. This can be arranged through BAGMA, a registered training provider, on 0870 205 2834.

Operator's Name:	Operator's Signature:
Operator's Company:	Operator's Training / Assessment Card details (Lantra / NPTC / ROLO etc)
Installation Date:	Installer's Name:
Installers Company:	Installer's Signature:
	Installer's ROLO Number:

Information on training and assessment provision can be obtained from [www.bagma.com](http://www.bagma.com)

White copy – Operator Green copy – Installing company Yellow copy – Employer

Training courses supported by Norwich Union Insurance, and Byas Nosley Schemes



## Keith Jaynes looks at what is now required when it comes to receiving new machinery and the training which is now available to smooth the process

During training installers are assessed. Following training they are tested to ensure that they satisfy the standards set by BAGMA for accreditation under its ROLO scheme. On successful completion, installers are awarded approved status by BAGMA and receive a unique 'photo licence' card to prove that they are authorised to use the BAGMA scheme and documentation to record the delivery of installation.

Each operator who is involved in installation and familiarisation delivered by BAGMA-approved installers receives an individual record of installation that notes the machine type(s) on which this was delivered, the specific modules included and details any further training that may be relevant. For example, LANTRA Awards training for operators with little previous experience of tractor and grounds care operations. This provides evidence of familiarisation with different machine types that can be valuable to future employers.

So where does the installation stop and operator training begin?

Installation is normally the responsibility of the supplier and is largely about communicating important information face to face to all operators – assuming that many will already be experienced. Operator training is the responsibility of the employer and aims to develop the skills of employees with limited experience of a particular type of machine. In practice, there are many crossovers between the content of each. For example Health and Safety, daily maintenance, use of the controls, etc. Fortunately, the same modular system was originally developed for operator training and can be easily adapted for use by Course Managers too.

The BAGMA programme was developed in conjunction with the Health & Safety Executive, which believes that the investment in training to prevent an accident is more effective than its legal prerogative to enforce action in the event of one. Norwich Union also endorses the BAGMA programme and urges employers to look not just at the legal reasons for training but also at the cost benefit of lower insurance premiums.

The system has been piloted by a number of different organisations. One, a major machinery hire company, nationally known in the turf care industry, was keen to adopt the system because its own research showed that where machinery was correctly installed there was a measurable reduction in damage during operation. Where this was followed by further formal operator training the maintenance savings between trained and untrained hirers were substantial.

A leading tractor manufacturer was also involved in the development and trial of the system. It is excited about the potential of the system in other areas of its business, particularly public demonstrations where risk assessment and familiarisation are critical.

All acknowledge that there is more to installation than simply 'covering your back' against potential litigation – particularly civil claims! For example:

**Performance:** Correct operation means users profit from promised machine performance, adding value to the relationship with the supplier.

**Maintenance:** Machine support costs, including warranty claims on the manufacturer, should be reduced as a result of correct operation. What's more, additional emphasis can be placed on areas of potential misuse that subsequently reduce the need for maintenance, which, in turn, saves money.

**Relationships:** Strong customer relationships are very important. The extra care taken over installation is likely to be repaid in stronger customer relationships.

**Activity Insight:** The installer has a unique opportunity to spend up to two hours with the customer, answering operator questions about the new machine but also learning more about how the Course Manager/employer intends to use it and what results are critical.

Although the supplier is responsible for installation, the process also requires the co-operation of the Course Manager to ensure that the right operators are made available to learn about the new machine and that the timing and location are suitable.

The BAGMA installer training programme places considerable emphasis on health and safety, in particular the ability to conduct risk assessments following the "5 Step" approach advocated by the HSE. This doesn't just cover identifying and communicating specific hazards inherent in the operation of the machine, it also includes a site assessment to ensure that potential risks of installation are acted upon and any special conditions required for installation are planned in advance. For example, public access to areas, contingency for installation in wet / cold conditions; any Personal Protective Equipment (PPE) required, etc.

David Golding, Education Director of the GTC, is pleased that BAGMA has launched its installation initiative, but added a word of caution.

"Installation should be conducted professionally to ensure all operators are aware of the safe and correct procedures for operating machinery that is new to them," he said.

"However, safety and performance are on-going, which is why all operators should receive additional comprehensive training on site. This is why the GTC has invested heavily in coaching programmes and the development of Course Managers as workplace assessors to develop greenkeeper skills on the job.

"Following the delivery of installation to the Course Manager and operatives," he adds, "the recording of staff competencies should become the norm. The necessary documentation, such as the GTC's Training Manual and the BIGGA Training and Assessment Manual, is readily available to Course Managers."

Installation is NOT a substitute for operator training. Getting the best from the latest turf care machinery and equipment takes a considerable amount of skill and knowledge. Skills develop over time with practice. What operators learn and how well they perform is the responsibility of their managers.

In the words of the Chinese proverb: A journey of 1000 miles starts with a single step. Effective installation should set the scene for what is to follow. It should place clear emphasis on safe operation and correct operation, which is then followed by continuing with training to ensure the basics are consolidated into every day work as a matter of course.

BAGMA and the GTC co-operate on key issues such as safety and areas of operator training designed to offer a more professional service to the employer. Further information about installation and other training options available to Course Managers and those involved in the supply and use of professional turf care machinery is available from:

The Greenkeepers Training Committee: Aldwark Manor, Aldwark, Alne, York YO61 1UF. Phone: 01347 838640. e-mail: [golf@the-gtc.co.uk](mailto:golf@the-gtc.co.uk). website: [www.the-gtc.co.uk](http://www.the-gtc.co.uk)

BAGMA: 1st Floor, Entrance B, Salamander Quay West, Park Lane, Harefield, Middlesex UB9 6NZ. Phone: 0870 205 2834. e-mail: [info@bagma.com](mailto:info@bagma.com) website: [www.bagma.com](http://www.bagma.com)