



Forklift Safety Program for Santa Barbara County Education Office and Districts

1. Program Purpose and Scope

The goal of this program is to provide a safe working environment by ensuring all forklift operators are trained, certified, and competent according to California OSHA regulations. This program applies to all employees authorized to operate forklifts within the SBCEO and its district's facilities. This written program complies with California OSHA regulations, focusing on operator training, equipment inspection, safe operation, workplace hazards, and documentation. This program ensures forklift safety in alignment with CCR Title 8, section 3668 and related standards.

2. Operator Training and Certification

Initial Training: Operators must complete a comprehensive training program before operating forklifts, including:

Formal instruction (lectures, videos, written materials) covering forklift operation and safety rules.

Practical training with demonstrations by a qualified trainer and hands-on exercises for the trainee, and evaluation of the trainee's performance.

Refresher Training: Required every three years or whenever:

- An operator is observed operating unsafely.
- The operator is involved in an accident or near-miss.
- The operator is assigned to a different type of forklift.
- Workplace conditions change that affect forklift operation.

Trainer Qualifications: Trainers must have the necessary knowledge, training, and experience to instruct and evaluate forklift operators.

Certification: Employers must maintain certification records including operator name, training and evaluation dates, and trainer identity.

3. Forklift Operation Safety

Operators must be aware of forklift capabilities, including load capacity and stability.

Forklift pre-operation checks must be performed before each use, covering brakes, steering, controls, tires, forks, safety devices, fuel or battery status, and warning systems.

Operators shall adhere to safe driving practices:

- Use of seat belts and other safety equipment.
- Travel at safe speeds, avoiding sharp turns.
- Use of horn at intersections and when pedestrians are near.
- Keeping loads low and balanced.
- Following designated pathways, especially in pedestrian areas.
- Personnel elevation on forklifts is only permitted using approved platforms with guardrails and fall protection.
- Areas where forklifts operate shall be maintained clear of hazards such as debris, uneven surfaces, and blind corners.

4. Workplace Safety Measures

Separate pedestrian and forklift traffic with barriers where possible.

Adequate lighting and hazard signage must be in place in forklift operating areas.

Regular safety inspections to identify and mitigate environmental hazards affecting forklift operations.

Implement lockout/tagout procedures for forklift maintenance and battery charging.

5. Equipment Maintenance and Inspection

Daily pre-shift forklift inspections are mandatory to identify defects or safety hazards.

Forklifts found unsafe must be removed from service until repaired.

Inspection checklists must be documented and kept on file for at least one year.

Periodic maintenance shall follow manufacturer recommendations and legal requirements.

6. Documentation and Recordkeeping

Maintain records of all operator training, evaluations, refresher training, and certifications for at least three years.

Maintain forklift inspection records, including daily checklists and repair reports, for at least one year.

Document details include operator name, training dates, evaluation dates, type of forklift, topics covered, trainer identification, and certification expiration.

Use acknowledgment forms where operators confirm understanding of forklift safety regulations.

7. Program Administration and Responsibilities

Supervisors are responsible for implementing the program, ensuring compliance, and maintaining records.

Employees must follow all forklift safety procedures and participate in required training.

Safety personnel shall monitor compliance and perform audits to verify program effectiveness.

This forklift safety program framework aligns with California OSHA requirements, ensuring a structured approach to forklift safety in the educational office environment of Santa Barbara County. Employers should tailor specific procedures and forms to their unique workplace conditions while maintaining compliance with state regulations.



Forklift Daily Inspection Checklist

Date: _____

Forklift ID: _____

Operator Name: _____

1. Visual Check

Forks and attachments: ☐ Good ☐ Damaged

Tires: ☐ Good ☐ Damaged or Low

Seatbelt: ☐ Working ☐ Not Working

Lights and horn: ☐ Working ☐ Not Working

Overhead guard: ☐ Secure ☐ Damaged

2. Functional Check

Steering: ☐ Good ☐ Problem

Brakes: ☐ Working ☐ Problem

Controls (lift, tilt, etc.): ☐ Working ☐ Problem

Backup alarm: ☐ Working ☐ Not Working

3. Fluid Levels

Oil: ☐ OK ☐ Low/Leak

Coolant: ☐ OK ☐ Low/Leak

Hydraulic fluid: ☐ OK ☐ Low/Leak

Fuel or Battery: ☐ OK ☐ Low

Comments:

Forklift Condition:

- ☐ Safe to Use
- ☐ Not Safe – Do Not Use

Operator Signature: _____

Supervisor Signature: _____

Keep this form on file for safety records and quick checks before use. It must be kept for a minimum 1 year.