



Appendix 1: ALLMI Appointed Person Training Course.

Section 1: Introduction

Since 1998, Regulation 8 of The Lifting Operations & Lifting Equipment Regulations 1998 (LOLER), has contained a requirement for all lifting operations to be planned by a competent person. This role is typically known as the Appointed Person.

The recently revised BS7121 – Code of Practice for the safe use of Cranes - Part4:2010 Lorry Loaders contains clear guidance on the key principles of such lift planning requirements and for the training of Appointed Persons.

The role of Appointed Person is at the very top of the lifting team hierarchy with a significant degree of responsibility. Therefore, the selection by employers of suitable candidates for training in this role is paramount in ensuring they are suitable and can not only perform to the required standard on the assessments; but also on an ongoing basis when carrying out the duties of the Appointed Person.

Annex A Section A.3.1 of BS7121 Part 4 states that Candidates should be selected by the Employer for training as an Appointed Person on the basis of their: -

- a) Prior relevant experience
- b) Academic & vocational qualifications
- c) Numerical and literary ability
- d) Supervisory and management skills; and experience.

Whilst responsibility for the selection, training and ongoing assessment of any employee's competence rests squarely with the Employer, the purpose of this document is to provide assistance in determining an individual's suitability for training as an Appointed Person; and in assessing their aptitude prior to selecting which course(s) may be most appropriate.

It must be strongly emphasised that assessing the aptitude of a candidate is highly important. Sending any employee on a course which is too fast-paced or for which they may not possess all the relevant attributes will have expensive consequences for your business, in terms of wasted course fees and days spent training; not to mention de-motivation of the individual concerned.

This document also contains the following: -

- A set of Aptitude Test Questions (with answers for the employer to be able to mark them).
- A matrix of courses available to assist in filling any requirements highlighted by the Aptitude Questions.
- Some real examples of different candidate profiles.
- A course registration form.

Please note: acceptance by ALLMI of any candidate for a place on the Appointed Person course does not constitute an endorsement by ALLMI of the Employers assessment of the candidate's suitability. Should the course instructor believe that the candidate lacks the key skills required at any point in the course, we reserve the right, after discussion with the candidate, to ask them to leave without any refund of course fees being payable to the Employer.



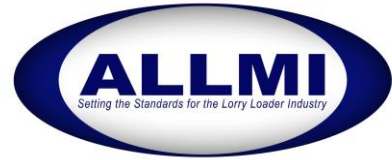
Section 2a: ALLMI Aptitude Test for Appointed Persons Course

Please answer the following questions. Some are worth more than one point so please read each question carefully to ensure you understand what you are being asked and are answering in full.

Legislation & Standards	Score
1. Who is responsible for providing a Safe System of Work? – 1 point	
2. Which piece of legislation relates to all types of lifting equipment? – 1 point	
3. Who has responsibilities under sections 7 & 8 of the Health & Safety at Work Act? – 1 point	
4. What is the standard applicable for the safe use of lorry loaders? – 1 point	
5. EN12999 is the standard which provides guidance on adherence to which legislation? – 1 point	
Lorry Loaders	Score
6. How can the capacity of a lorry loader at any given radius be calculated? – 1 point	
7. What is the function of a Rated Capacity Limiter? – 1 point	
8. When should the stabilisers be fully deployed and are there any exceptions? – 2 points	
9. When should a pre-use check be carried out? – 1 point	
10. What consideration should be made with regard to the capacity of the lorry loader if using an attachment i.e. brick grab? – 1 point	



Slinging & Signalling	Score
11. Who is responsible for initiating the movement of the load? – 1 point	
12. What is the maximum included angle to be used on slings and why? – 2 points	
13. What is the SWL on a 1 tonne WLL sling if it is used in a choke hitch? – 1 point	
14. When should lifting accessories be checked? – 1 point	
15. How often does a lifting accessory or attachment need to be thoroughly examined? - 1 point	
Lift Planning Considerations	Score
16. List four observations to be made concerning ground conditions when siting a lorry loader? – 4 points	
17. List four considerations to be made concerning other hazards when siting a lorry loader? – 4 points	
18. List four observations to be made concerning the load when planning the lift? – 4 points	
19. List four observations to be made concerning the load landing area when planning the lift? – 4 points	
20. List four possible causes of loader tipover? – 4 points	



Subject	Score Achieved	Max Available
Legislation & Standards		5
Lorry Loaders		6
Slinging & Signalling		6
Lift Planning Considerations		20
Total		37

Name:

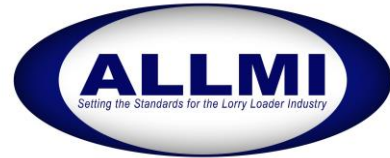
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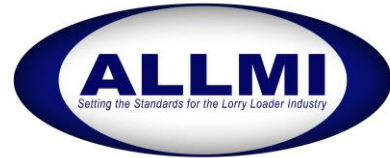
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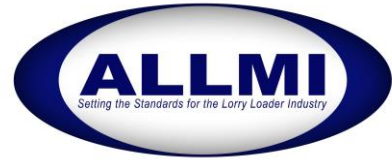
Section 2b: Aptitude Test Answers – Employer Use Only

This section contains correct answers and marking guidance.

Legislation & Standards	Score
1. Who is responsible for providing a Safe System of Work? – 1 point <i>A: The Employer</i>	
2. Which piece of legislation relates to all types of lifting equipment? – 1 point <i>A: LOLER 1998</i>	
3. Who has responsibilities under sections 7 & 8 of the Health & Safety at Work Act? – 1 point <i>A: The Employees</i>	
4. What is the standard applicable for the safe use of lorry loaders? – 1 point <i>A: BS7121 Part 4</i>	
5. EN12999 is the standard which provides guidance on adherence to which legislation? – 1 point <i>A: Machinery Directive</i>	
Lorry Loaders	Score
6. How can the capacity of a lorry loader at any given radius be calculated? – 1 point <i>A: By working out the tonne-metre rating from the load chart i.e. radius x weight (1/2 point only for mention of load chart).</i>	
7. What is the function of a Rated Capacity Limiter? – 1 point <i>A: To prevent the loader from being overloaded & to permit the safe recovery from an overload situation (1/2 point each).</i>	
8. When should the stabilisers be fully deployed and are there any exceptions? – 2 points <i>A: At all times (1 point) except if fitted with a stabiliser monitoring device or stabiliser interlocks (1 point).</i>	
9. When should a pre-use check be carried out? – 1 point <i>A: At the start of each working day or shift (1/2 point); or when taking the machine over for the first time (1/2 point).</i>	
10. What consideration should be made with regard to the capacity of the lorry loader if using an attachment i.e. brick grab? – 1 point <i>A: The weight of the grab reduces the capacity which can be lifted by the loader.</i>	



Slinging & Signalling	Score
11. Who is responsible for initiating the movement of the load? – 1 point A: The Slinger (or slinger/signaller but not just “signaller”)	
12. What is the maximum included angle to be used on slings and why? – 2 points A: Between 90° & 120° depending on sling type and configuration (1 point). Any greater angle will result in the WLL of the slings being exceeded (1 point).	
13. What is the SWL on a 1 tonne WLL sling if it is used in a choke hitch? – 1 point A: 800 kgs (it reduces by 20%).	
14. When should lifting-accessories be checked? – 1 point A: Before and after each use.	
15. How often does a lifting accessory or attachment need to be thoroughly examined? - 1 point A: 6 monthly.	
Lift Planning Considerations	Score
16. List four observations to be made concerning ground conditions when siting a lorry loader? – 4 points – any 4 of the following examples: Level/slopes, firm, sandy, boggy, cellars, drains, cavities excavations, underground services, free from obstructions.	
17. List four considerations to be made concerning other hazards when siting a lorry loader? – 4 points - any 4 of the following examples: Power lines, phone lines, bridges, scaffold, buildings, trees, people, moving plant, cars, traffic, wind, rain, snow, bright sunshine.	
18. List four observations to be made concerning the load when planning the lift? – 4 points - any 4 of the following examples: Weight, dimensions, lifting points, centre of gravity, is it live, have I got the correct accessories, height of slings, is it stable, where is it going?	
19. List four observations to be made concerning the load landing area when planning the lift? – 4 points - any 4 of the following examples: Free from obstructions, flat/level, capable of bearing load, reachable, do I need chocks for the load, will I be able to recover slings, is the route clear?	
20. List four possible causes of loader tipover? – 4 points - any 4 of the following examples: Soft ground, incorrect/non-deployment of stabilisers, load swing due to slopes, load swing due to wind, erratic operation, slopes, non-use or incorrect selection of stabiliser footpads, ground collapse. N.B. Overloading is not an acceptable answer to this question.	



Section 3: Courses Matrix

The following matrix shows which courses are available, including their duration and whom they can be booked with.

Course Description	Duration	Maximum Candidates	Available From
ALLMI Lorry-loader novice	2 days	4	All Training Providers
ALLMI Slinger/signaller novice	2 days	4	Some Training Providers
ALLMI Lorry-loader experienced/refresher	1 day	4	All Training Providers
ALLMI Slinger/signaller experienced/refresher	1 day	4	Some Training Providers
ALLMI Foundation Course *	1 day	6	Book with ALLMI Direct
ALLMI Direct Entry Appointed Person Course **	2 days	6	Book with ALLMI Direct
ALLMI Extended Appointed Person Course ***	3 days	6	Book with ALLMI Direct

Notes:

For courses listed as available from all or some training providers, please visit www.allmi.com for a full list and an enhanced search option based on distance and facilities available/courses offered.

*The Foundation Course is attendance based only and does not include any assessments other than an informal check against the original aptitude test questions.

**The Direct Entry Appointed Person Course consists of one day theory and practice, with day two consisting entirely of revision & assessments.

***The Extended Appointed Person Course consists of the same as the Direct Entry – but with an additional day in the middle for extended coaching and practice exercises.

Section 4 on the next page provides some real examples of candidate profiles and how they performed on the pilot courses.



Section 4: Examples of Candidate Profiles

The purpose of this section is to provide real examples of some candidates who attended the pilot stage Appointed Person courses (all 2 days); including details of their background and experience, together with a summary of their performance on the assessments. *All names and other minor details have been changed.* These examples can be used to gauge or compare the backgrounds and outcomes against potential future candidates to assist the most appropriate course selection.

The three assessment modules within the Appointed Person course consist of the following: -

Assessment 1: Theory question paper – a combination of multiple choice & open questions.

Assessment 2: Two questions whereby slinging angles have to be calculated and a choice of slings made which is based on that calculation.

Assessment 3: To prepare a lifting plan for a complex lift based on any one of a number of randomly selected scenarios. This includes the preparation of a lift-plan drawing and all key information contained within the scenario must be incorporated.

Example 1 – Bill:

- Bill has a strong mechanical background and knowledge.
- He has recently attended refresher courses for both lorry-loader and slinger/signaller.
- He currently works in a transport managerial role within a large multinational company but prior to attending the course had no hands-on experience in the planning of lifting operations.
- Bill performed strongly on the first theory assessment.
- He was quick to understand the basic geometry taught and had no difficulty in calculating angles on the second assessment.
- Bill achieved a pass on the third assessment, although his lifting plan lacked some of the smaller details which would have ensured a higher score.

Summary:

- Although Bill achieved a pass on the 2-day course, he felt his scores would have been further enhanced had he had a stronger knowledge of standard types of sling specifications available; and also had he had more time before the course to gain a further appreciation of the content of the ALLMI/CPA Best Practice Guide which is now sent as standard to all candidates once registered.
- Bill said he would have benefitted in strengthening his knowledge on an additional practice/coaching day during the course.
- Bill's mechanical empathy, numeracy/literacy and experience of working on detailed documents under pressure were all strong factors in his successful outcome.
- Bill knew he would immediately be involved in the drafting of various generic lift-plans for his company and was able to put his knowledge to good effect.



Example 2: Sean

- Sean works for a regional company who, by the nature of their business place a strong emphasis on safety in the workplace and contingency planning.
- As a consequence, Sean is very experienced in the preparation and implementation of Safe Systems of Work and Risk Assessments/Method Statements.
- However, Sean had a very limited degree of experience in using lorry-loaders and the application of slinging methods.
- To combat this, Sean attended the ALLMI one-day foundation course prior to his Appointed Person course – where he gained some key knowledge on basic lorry-loader and slinging principles.
- Sean performed strongly on all three assessments.

Summary:

- Sean's strong experience on the planning side and his ability to extract relevant information from the foundation course resulted in an excellent pass.
- Sean admitted afterwards that although he had passed, he would like to further his lorry-loader/slinging knowledge and skills and may attend the relevant courses.

Example 3: Richard

- Richard comes from an engineering background and has several years experience in the service and repair of lorry loaders.
- He has also been successfully involved in the delivery of lorry-loader training for the last three years.
- He had no prior experience of lift-planning and was not familiar with the concepts covered such as assessment of lift complexity, Risk Assessment and lift-plan drawings.
- Richard passed theory assessment one comfortably.
- Richard struggled with the geometry on assessment two.
- Richard struggled with assessment three due to his lack of experience/knowledge in the lift-planning process.

Summary:

- Richard (understandably) felt that the 2-day course had not given him the preparation and teaching required to undertake the assessments.
- Richard's employer could have possibly taken more time prior to registering him for the course in determining whether he had the confidence in learning some of the basic geometry which is taught on the course.
- Richard would definitely have benefitted from an additional day of teaching in the middle of the course prior to assessment day.



Example 4: Francis

- Francis has worked in a company which provides specialised lifting services with lorry-loaders for over 10 years.
- He has been involved for the last several years in the lift-planning process but has never had a formal qualification; nor any formally confirmed responsibility within his business.
- Francis has a reasonably sound working knowledge of lorry-loaders although he has not attended a lorry-loader operator course for many years.
- He has advanced knowledge and experience of selection of slings and other lifting accessories.
- Francis performed strongly in all three assessments.

Summary:

- Francis experienced little difficulty on the 2-day course as he was effectively formalising and confirming his existing knowledge and experience.
- He felt he had gained much from the course in terms of re-affirming his understanding of the responsibilities of the role of Appointed Person; and also the methods taught for calculating stabiliser forces and slinging angles.
- Francis was particularly pleased to have successfully attained a “formal qualification” and to have had opportunity to be assessed by his peers.

It is expected that by carrying out the aptitude test on potential candidates and comparing their existing knowledge and experience to the examples listed, an Employer should have a reasonable insight into the following: -

1. Do they have the basic attributes contained within BS7121 Part 4 and listed on page one?
2. Have they achieved a score of at least 70-75% on the aptitude test with equally balanced scores in each section?
3. Do they find the course topic interesting?

ALLMI will be pleased to offer further guidance on appropriate routes and course requirements for any potential candidate. However, it must be reiterated that ultimate responsibility remains with the employer in ensuring the candidate has the right aptitude and attitude before registering them for this course.

A course registration form is on the following pages. It should be read carefully and a copy kept when submitting it.



Section 5: ALLMI Appointed Person Course – Registration & Eligibility Form

Important:

- This form must be submitted by the Employer, together with any requested supporting documentation.
- Upon acceptance by ALLMI of the Candidate’s registration, joining instructions will be issued.
- Acceptance of any Candidate onto the Appointed Person course does not constitute an endorsement by ALLMI of their suitability. Should the course instructor believe that the Candidate lacks the key skills required at any point in the course, we reserve the right, after discussion with the Candidate, to ask them to leave without any refund of course fees being payable to the Employer.

Candidate Name:

Company/Employer:

Address:

.....

..... Post Code:

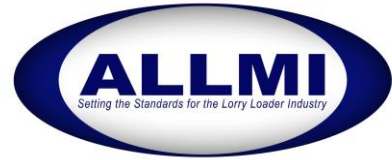
Phone:

Email:

Personal Information: As part of its provision of training courses, ALLMI collects personal data from individual trainees. ALLMI respects the privacy of each trainee and is committed to ensuring that any personal data it holds is utilised in a fair and lawful way in accordance with UK data protection legislation. Further details regarding ALLMI's commitment to data protection can be found in ALLMI's Data Protection Policy, which is available at www.allmi.com/dataprotectionpolicy, or in hard copy upon request.

Course Type Requested (please tick all which apply):

- ALLMI 1-Day Foundation Course
- ALLMI 2-Day Direct Entry Appointed Person Course*
- ALLMI 3-Day Extended Appointed Person Course



**Please note that the 2-Day course is for experienced Appointed Persons only. Experience / knowledge should include developing lift plans and safe systems of work, as well as an understanding of lorry loaders (including rated capacity) and slinging principles. Please provide details of experience below, if applying for a 2-Day course:*

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Has the Candidate previously attended any other type of ALLMI Course? If so, please state their ALLMI ID Number in the adjacent box:

Please read and sign the following declaration:

I certify that I consider the Candidate named on this form to be suitable to attend the ALLMI Appointed Person course.

Signed:

Print Name:

Company:

Position:

Date:

Items required for Candidates to bring to the course:

- A Casio *Fx-73* or *Fx-83* series scientific calculator with sin/cos/tan functions.
- A basic maths set inc. compass, protractor, ruler, etc.
- Pen and pencil.
- Graph pad.

Please submit this form together with copies of any required documentation to ALLMI. Please do not send any originals, as they will not be returned.