

## Operating Requirements for Bucket Trucks

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HSSE Interim Directive  
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### I. CONTEXT

To move forward on our journey towards a safe, simplified facility that delivers consistent and dependable business results it is necessary to institutionalize the following interim directive for Operating Requirements for Bucket Trucks. These changes are necessary to ensure that we have appropriate levels of assurance and accountability to facilitate an accident and injury free operation of our site. Final recommendations will be issued after the accident investigation.

### II. DIRECTIVE

#### A. Operating Requirements for Bucket Trucks

1. Procurement and Job Reps to communicate the requirements to all contractor companies
2. BP Operations Supts/Maintenance Supts/TAR Supts to communicate the requirements to all BP personnel
3. BP employees
  - a) BP line management will verify that BP employees who operate the equipment are currently qualified
  - b) BP L&D will provide and maintain a list of current qualified BP equipment operators
  - c) BP L&D will provide equipment operator training to BP personnel which meets or exceeds OSHA, ANSI and BP standards
    - (1) A recommended source is the manufacturer's training program
    - (2) Incorporate Golden Rules - Lifting Operations recommendations
    - (3) The training must be equipment specific and must cover the intended uses of the equipment
    - (4) Training must include the reporting and investigation of incidents, including improper use
    - (5) Periodic refresher training will be provided in accordance with the training matrix at a maximum of two years.

- d) Each BP employee must complete a Bucket Truck pre-use inspection record. (3 operators = 3 pre-use inspection records)

4. Contractors

- a) BP Procurement will include in contracts the requirement that contractors provide assurance they are meeting the Operating Requirements for Bucket Trucks
- b) Contractors will ensure that their employees who operate Bucket Truck equipment are currently qualified
- c) Contractors will ensure their Bucket Truck operator training meets or exceeds OSHA, ANSI and BP standards
  - (1) A recommended source is the manufacturer's training program
  - (2) Incorporate Golden Rules - Lifting Operations recommendations
  - (3) The training must be equipment specific and must cover the intended uses of the equipment
  - (4) Training must include the reporting and investigation of incidents, including improper use
  - (5) Periodic refresher training will be provided at a maximum of two years
  - (6) Documentation of training must be readily available.
- d) Each contractor Bucket Truck operator must complete a BP pre-use inspection record as a minimum. (3 operators = 3 pre-use inspection records)

B. **Mechanical Integrity**

- 1. The equipment supplier will have a process to confirm that the equipment is functional at the time it is received at the jobsite
  - 2. The equipment supplier will have a preventative maintenance/repair program which meets or exceeds manufacturer's recommendations
    - a) The program will include a process for records management
    - b) A reminder system to ensure timely repairs
    - c) The equipment provided must have a sticker or posting indicating when next preventive maintenance is due. This must include all manufacturer required inspections
  - 3. Equipment operators shall discontinue use of and tag any equipment which cannot be operated safely. This includes taking out of service equipment in which the safety mechanisms are not properly functioning or is past the next indicated preventive maintenance date
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4. Equipment operators are responsible to communicate equipment damage or malfunctions so that equipment can be repaired or removed

**C. Hazard Assessment**

1. The Hazard Assessment process must be used in planning the work to determine if a Bucket Truck is an acceptable tool for the job and to determine acceptable sizes for the Bucket Truck
  - a) Contractors will use their own Hazard Assessment process to determine if the equipment meets their specifications to accomplish the work. The outcome of the Hazard Assessment must be as rigorous as the BP Hazard Assessment
2. The Hazard Assessment will be signed by the supervisor and the BP job rep.

**D. Assurance Audits**

1. HSSE will provide the following assurance audit reviews:
  - a) Initial review of L&D program to confirm equipment operator training meets or exceeds OSHA, ANSI and BP standards
  - b) Spot check, (10 cases) within the next 90 days, to verify that
    - (1) Qualified equipment operators are being used
    - (2) Equipment checkout sheets are being used
    - (3) Hazard Assessments are being used
    - (4) The preventive maintenance sticker is being used
  - c) Annual audit of maintenance records

**E. BP Golden Rules for Lifting Operations**

1. Lifts utilizing cranes, hoists or other mechanical lifting devices will not commence unless:
  - a) an assessment of the lift has been completed and the lift method and equipment has been determined by a competent person(s)
  - b) operators of powered lifting devices are trained and certified for that equipment
  - c) rigging of the load is carried out by a competent person(s)
    - (1) Loads should never be rigged to a bucket truck
  - d) lifting devices and equipment have been certified for use within the last 12 months (at a minimum)
  - e) load does not exceed dynamic and/or static capacities of the lifting equipment
  - f) all safety devices installed on lifting equipment are operational

- g) all lifting devices and equipment have been visually examined before each lift by a competent person(s)

C. H. Maclean  
Business Unit Leader

## BP Texas City Site Bucket Truck Operator Pre-Use Inspection Record

Make: \_\_\_\_\_ Machine Number: \_\_\_\_\_ Serial Number: \_\_\_\_\_

**Items to Be Inspected:**

Emergency controls are in proper working condition? (Emergency Stop Device and emergency lowering function.)
Safety devices are functional? (Foot pedal, spring lock, boom angle indicator, etc.)
All safety motion alarms are functional?
All lighting is working properly? (beam, directional or safety)
Fire extinguisher on bucket truck?
All controls function properly? (Basket and ground including: up, down, right, left, forward, back, ect.)
All controls are adequately protected from inadvertent operation?
Ground operating controls successfully over-ride the aerial controls?
All switch and mechanical guards are in good condition and properly installed?
Fuel level is acceptable and the system is not leaking?
Engine coolant and oil level is acceptable and the system is not leaking?
Hydraulic level is acceptable and the system is not leaking?
All other gauges and indicators are functioning properly and showing acceptable conditions or levels.
Are there any loose or missing parts? (Bolts, fasteners, braces, brackets, ect.)
Work platform is clean, dry and clear of debris?
Tires, wheels, and lug nuts are in good condition?
No defects such as cracked welds, damaged control cables, damaged wire harness or other obvious damage?
Braking devices are operating properly?
The manufacturer's operations manual is stored on the lift (in all languages of the operators)?
Boom and lift pivot pins are in good working order?
Level cable does not appear to be frayed?
Bucket is in good condition, there are no signs of weathering and there is no standing water present?
Fiberglass Boom or other insulating components are not visibly damaged or contaminated?
Fall protection tie-off points are in good condition?
Stabilizers, outriggers and/or extending axles function properly?
Placards, Instructional Markings and Operational Markings are in place and legible?
All manufacturer required inspections of all hydraulic control relief valves and other manufacturer requirements have been completed within the required time period? Check inspection sticker on equipment for validation.
Annual dielectric test has been completed? (Verify by checking inspection sticker)
Battery indicator shows an acceptable level remaining?
Electrical systems of/or related to the aerial device are working properly and there are no signs of excessive deterioration, dirt and moisture accumulation?
All suspected items have been carefully examined or tested and passed as safe by a qualified person?

**Comments:** \_\_\_\_\_

CAUTION – If the bucket truck is found to be in need of repair or contributes to an unsafe condition, report the condition immediately to your supervisor or job representative; the truck must be tested and passed as safe by a qualified person. The truck shall not be operated until it has been restored to safe operating condition. During operation report any unsafe condition immediately to your supervisor or job representative. **DO NOT MAKE REPAIRS OR ADJUSTMENTS UNLESS SPECIFICALLY CERTIFIED TO DO SO.** For assistance contact the BP Garage at Ext. 21981 or the equipment supplier.

Pre-Use Inspection Record

Equipment Operator: **Signing here indicates that you have completed the pre-use inspection and no repairs are needed.**

Print Name	Company	Date/Time	Initials	Print Name	Company	Date /Time	Initials

Send completed card to BP garage. This checklist must be maintained for 30 days after the last date on form.

**Only trained and qualified operators are allowed to operate equipment.**

This inspection card should not be considered all inclusive nor should they supersede the manufacturers and/or governmentally required equipment inspection forms.

### Hazard Assessment for Bucket Trucks

Project:	Date:
Equipment Type/No.:	Location

		Yes/No	Comments
<b>Right tool for the job</b>	Have other alternatives been considered? (scaffolding, ect.)		
	When compared to other alternatives, is this the solution that presents the least risk?		
	Is this the correct size of bucket truck required for the job? (bigger is not always better)		
	Is the equipment designed for the job and is it marked accordingly?		
	Has the job been properly planned to provide sufficient time, materials and supervision?		
<b>Operator trained/certified</b>	Are equipment operators trained and authorized to operate designated equipment?		
	Can training documentation be readily provided?		
	Will the equipment operator review the manufacturer's operating manual and become familiar with the equipment?		
	Has the operator operated this equipment within the last six months?		
<b>Mechanical Integrity</b>	Have all personnel involved with the lift been fully briefed on the sequence of the planned operation and its limitations (visibility, load capacities, landing area capacity, etc.)?		
	Will a pre-use inspection be completed prior to starting the job?		
	Will Hot Line tools be inspected before use? (if applicable)		
<b>Workplace Inspection</b>	Has a dielectric integrity test been performed per the manufacturer's recommendations?		
	Is the area free of drop-offs, holes, or bumps, including those concealed by water, ice, mud, etc.?		
	The aerial platform shall not be operated on grades, side slopes or ramps exceeding the rating given by the manufacturer. Is the aerial work platform on flat stable ground?		
	Is the work area free of debris?		

	Is adequate clearance between overhead obstructions and electrical conductors maintained? (20ft clearance from energized electrical conductors or equipment that has not been isolated per PR-14 procedures) If not, is the operator qualified to work within the limited approach boundary?		
	Is the area clear of hazardous locations and atmospheres?		
	Is the ground surface and support sufficient to withstand all load forces imposed by the aerial platform in all operating configurations?		
	Will the load on the platform and/or load lifting devices be in accordance with the manufacturer's rated capacity?		
	Are the wind and weather conditions conducive to the operation?		
	Is the affected area barricaded to control unauthorized persons?		
	Does the operator know to set the safety brake before beginning work?		
	Will the intended operation require the use of outrigger pads and stabilizers? If so, does the operator know to use the outrigger pads and stabilizers according to the manufacturer's instructions?		
	Has the method of grounding the equipment been determined? (if available, always use a permanent grounding before a temporary grounding)		
	Have other possible unsafe conditions been considered?		
<b>Personal Protection</b>	Do all occupants have proper personal fall protection?		
	Do all occupants know how to properly wear personal fall protection?		
	Are all of the operators aware that standing on step-stools or anything other than the floor of the aerial lift is prohibited?		
	Does the aerial platform contain only the tools and other loose articles necessary to complete the job? Are the tools stored neatly?		
<b>Spotter</b>	Has a trained spotter (designated ground man) been established?		
	Is the spotter trained on how to operate the equipment using the emergency ground controls?		

**Verify that all items have been marked Yes. If an item has been answered No, sufficient controls must be applied and documented in the comments section prior to approval.**

**Attach the completed Hazard Assessment to the ATW**

Equipment Operator Signature:		Date:	
Print Name:			
Equipment Operator Signature:		Date:	
Print Name:			
Equipment Operator Signature:		Date:	
Print Name:			
Job Rep Signature (if applicable):		Date:	
Print Name:			
Spotter Signature (if applicable):		Date:	
Print Name:			
Equipment Operator's Supervisor Signature:		Date:	
Print Name:			