

## **CLOCS** Site Access Traffic Marshal training guidance

The CLOCS Standard requires Principal Contractors to ensure that they:

 appoint competent site access traffic marshals who have received formal approved traffic marshal training that has included practical experience, for example CLOCS SATM training.

CLOCS encourages all clients and contractors to adopt the CLOCS SATM training, as it promotes a consistent approach across construction activity and ensures training is regularly reviewed and updated in line with legislation and emerging best practice. However, we recognise that some organisations may choose to use third-party training providers or develop their own in-house training.

This guidance has been developed to assist organisations in understanding whether any training meets the requirements of CLOCS in ensuring delegates have the relevant skills, knowledge and understanding, and have had the practical experience of guiding a live vehicle as part of that training.

This is not a comprehensive guide, and Principal Contractors should take all necessary steps to validate the quality of any third-party training and their own in-house training where used.

Under Regulations 4 and 13 of the 2015 CDM regulations, clients and principal contractors have a duty to ensure that the construction work they procure is carried out, so far as is reasonably practicable, without risk to the health or safety of any person affected by the project including the wider community and all vulnerable road users.

Ultimately, it is the responsibility of the Principal Contractor to ensure those carrying out the role of the traffic marshal have the necessary skills, knowledge, understanding and experience to manage vehicles safely at all times.

## Format and delivery

- Such training will typically be conducted in small groups of no more than 10 to ensure all delegates are engaged and involved and have the opportunity to take part in discussions and ask questions as needed.
- Training will normally take place on a live construction site in an appropriate room but the theory element can be provided in any venue with a suitable training room.
- Training will include presentations, group activities, practical exercises, discussions and opportunities for Q&A.
- As detailed within this guidance, practical experience as part of the training is a **mandatory requirement** to ensure that delegates have that experience of proximity to and responsibility for guiding a live construction vehicle. The vehicle will either be provided by the organisation delivering the training or an operator working on site who is available and willing to participate.
- All necessary risk assessments should be completed to ensure the safety of all.
- Those delivering the training should normally have a training qualification, a good understanding of applicable legislation, and preferably experience in construction.

## Content

SATM training should cover the following content as a minimum.

Roles and	• Explain the importance and purpose of the Site Access Traffic Marshal.
responsibilities	Recognise the potential impact of poor site access management on
	safety, productivity, and public perception of the construction project.
	List the Personal Protective Equipment requirements for Site Access
	Traffic Marshals.
	Describe the responsibilities and any limitations of Site Access Traffic
	Marshals guiding vehicles and the public in a range of operational
	scenarios.
	• Explain how the Site Access Traffic Marshal's role interacts with other
	traffic management roles.
Principles of	• Explain why construction traffic needs to be managed, particularly in
traffic	relation to safety.
management	• List the main components of good construction traffic management.
	• Describe how to establish and take ownership of the Site Access Traffic
	Marshal's work zone.
	Describe the traffic management schemes that Site Access Traffic
	Marshal can use to control traffic.
	• Explain the issues relating to vehicles accessing or egressing from the
	public highway.
	• List the health, safety, and environmental requirements associated with
	site traffic management e.g. vehicle idling (emissions).
Controlling site	• Provide a basic overview of logistics planning and delivery management
traffic volumes	systems.
	• Explain the principles of lorry holding areas to manage traffic movement.
	• Communicate with lorry holding area to hold and call vehicles forward.
	<ul> <li>Describe the procedure for handling unexpected and unplanned site</li> </ul>
	deliveries.
	• Describe the procedure for handling excess site traffic volumes.
	Understand how vehicle holding areas contribute to overall site logistics
	and how to ensure effective use of these areas.
	Recognise the impact of poor traffic volume management on local
	communities, including noise, pollution, and public safety.
	Understand that contingency plans may need to be implemented for
	unexpected deliveries, including how to prioritise and redirect vehicles
	when needed.



Protecting members of the public	<ul> <li>List the vulnerable groups which require special attention.</li> <li>List the short and medium-term segregation methods used on the public footway.</li> <li>Use short term segregation methods on the public footway (subject to local authority approval).</li> <li>Communicate with the general public with a positive attitude using powers of persuasion in the interest of safety.</li> <li>Handle visitors appropriately and take action in the event of unauthorised access and unauthorised vehicle passengers.</li> <li>Escalate any risks or issues to site management as the need arises.</li> <li>Explain the correct use of the 'Stop Works' sign ensuring effective control traffic during site access and egress.</li> </ul>
Vehicle safety requirements	<ul> <li>Identify the work-related road risk requirements of construction logistics contracts and their importance.</li> <li>Understand the CLOCS Standard's key vehicle safety requirements and</li> </ul>
	their role in minimising risk to vulnerable road users (VRUs).
	<ul> <li>List the main requirements of schemes such as the Fleet Operator</li> </ul>
	Recognition Scheme (FORS) and Mission Zero and how these apply to client requirements.
	<ul> <li>Describe the procedure to be taken when a vehicle is subjected to compliance checks.</li> </ul>
	<ul> <li>State the actions that could be taken in the event of a non-compliant vehicle or driver being identified.</li> </ul>
	<ul> <li>Identify and deal with safety issues relating to vehicles leaving a construction site.</li> </ul>
	<ul> <li>Describe how vehicle idling impacts emissions as well as the local community and to apply appropriate reduction measures.</li> </ul>
	<ul> <li>Demonstrate how to inspect:</li> </ul>
	<ul> <li>Vehicle safety equipment, including blind spot minimisation systems, side under-run protection, and warning signage.</li> </ul>
	• Presence of the fleet operator's certification.
	• Ensure driver compliance with Personal Protective Equipment
	(PPE) requirements.
	• Functioning vehicle safety equipment.
	Seek confirmation of:     Driver licence and \/DLL typining
	<ul> <li>Driver licence and VRU training.</li> <li>Last-mile route taken.</li> </ul>
	<ul> <li>Last-mile route taken.</li> <li>Any occurrence of collisions/near-misses on route.</li> </ul>



Actions in the event of an incident	<ul> <li>List the immediate safety actions to take in the event of an incident such as a road traffic collision, fire or environmental hazard.</li> <li>Safely control and direct an emergency service vehicle in the event of an incident.</li> <li>Provide witness statements to support the investigation process.</li> <li>State the reasons for adopting a positive culture towards reporting accidents, collisions, incidents and near misses to prevent recurrence.</li> <li>Explain the need to keep vigilant, observing for anything unusual.</li> <li>Recognise that there are local, regional and national campaign groups opposing infrastructure projects and developments.</li> <li>List the types of protest and tactics that campaign groups can use.</li> <li>Identify ways in which such protesters themselves.</li> <li>List the actions to take in the event of extremist and violent activity or illegitimate forms of protest.</li> <li>Recognise when a protest escalates into a security threat and identify appropriate actions to protect site personnel and the public.</li> <li>Signpost to further relevant training.</li> </ul>
Practical experience	<ul> <li>Demonstrate the use of short-term segregation methods on the public footway (subject to authority).</li> <li>Conduct the procedure to be taken when a vehicle is subjected to compliance checks.</li> <li>Guide a vehicle onto and out of the site using appropriate hand signals and with all proper and due care for operatives and members of the public.</li> </ul>
Assessment	<ul> <li>The training should include a test of the knowledge retained and understood with an appropriate pass mark, typically 70%.</li> <li>Answers should be discussed to identify and address any gaps in understanding.</li> <li>Delegates should receive a pass or fail for their performance in the practical element including correct hand signals, taking control, showing due care for operatives and the general public, safely guiding the vehicle at all times.</li> </ul>

