



**Deployment / Distribution / Transportation
Workforce Category**

LOGISTICS COMMUNITY OF INTEREST

5704 FORKLIFT OPERATING SERIES
Competency-Based Learning Map and Training Strategy

Published 2018

Forklift Operating Competency-Based Learning Map Overview

The United States Marine Corps (USMC) Logistics Community of Interest (COI) developed this competency-based learning map to support 5704 Forklift Operating series professional development of technical competencies and training. This learning map is organized by a group of competencies, which together define successful performance in the 5704 Forklift Operating series. Competency-based learning maps are essential resources for career development and useful for identifying the knowledge and skillsets needed to meet and/or enhance their skills in this occupational series.

Learning maps are comprised of several components, described in Table 1 below:

Table 1. Components of a Competency-Based Learning Map

Competency Titles and Definitions	Describe the capabilities required within a particular position or job role
Proficiency Target Levels	Define different levels of required performance (Entry, Journeyman, Expert) within a competency area
Behavioral Indicators (BIs)	Examples of activities performed by an individual that illustrate how a competency is demonstrated at varying levels of proficiency: Entry, Journeyman, and Expert
Training	<p>Mandatory: Training required to be completed based on Federal, State, or Marine Corps requirements/regulations</p> <p>Recommended: Core, Core-Plus, and Sustainment training identified to enhance performance in competency areas</p> <ul style="list-style-type: none"> • Core: Initial training that all personnel should have in related position from entry to senior levels • Core-Plus: Advanced training that is necessary for career progression that all mid-senior personnel should have in addition to the core training. Core-Plus training is recommended for personnel above Wage Grade (WG)-6 • Sustainment: Training intended to maintain credentials or a good training course to have, but not necessary for career advancement

Forklift Operating Series Defined

The 5704 standard covers nonsupervisory work involved in the operation of gasoline, diesel, or electric powered wheeled vehicles to haul cargo and fuel, transport passengers, or to tow or recover equipment. The vehicles are driven in restricted traffic environments on Government installations, over public roads and highways, or under cross-country conditions. Also included are motor vehicles which have special-purpose or auxiliary devices where a knowledge of such devices does not exceed the level of knowledge and skill required to operate the vehicle safely.

Competency Areas

Three competencies have been identified for the successful performance in the 5704 series:

1. Direction and Comprehension
2. Operational Safety
3. Forklift Operation

Proficiency and Skill Band Definitions

The Proficiency Rating Scale (Table 2) below details the rating given for each level of proficiency and its corresponding definition. Proficiency levels describe the degree of competency required to perform a specific job successfully; these levels relate to the work required for a specific job. Different jobs require different levels of proficiency for successful performance. The proficiency levels provided in this learning map indicate the minimum proficiency target for successful performance.

Table 2. Proficiency Rating Scale

1	Basic	No Proficiency	Conceptual Knowledge Only/No Experience
2	Applied	Low Proficiency	Able to Apply with Help
3	Intermediate	Moderate Proficiency	Able to Apply Autonomously
4	Advanced	High Proficiency	Proficient/Able to Help Others
5	Expert	Very High Proficiency	Expert Knowledge

The USMC COIs have outlined a career progress structure that more accurately reflects the change in your abilities and responsibilities over time. That structure is called the Skill Level Structure (Table 3). It is associated with each occupational series and follows you from the time you are an entry-level employee until you attain the level of a management employee. Career progress in the USMC has traditionally been based on the federal government pay schedule system. The ratings within the pay schedule system are associated with Job Skill Levels within the 5704 series indicated as follows:

Table 3. WG Skill Level Structure

Job Skill Level	Definition	Pay Plan	Beginning Grade	Target Grade
1	Entry	WG	5	5
2	Journeyman	WG	6	6
3	Expert	WG	N/A	N/A

Behavioral Indicators (BIs)

It is important to define how competencies are manifested at different skill levels. Behavioral Indicators are on-the-job examples of behaviors and activities that illustrate how a competency is demonstrated at varying skill levels and provide an objective description of the behavior that can be observed in an individual as evidence that they either have or do not have the skills at the required level needed for the competency. These are examples of what the competency could look like at varying skill levels and are not inclusive of all behaviors demonstrating the competency for each skill level. This information is provided as a tool to help guide evaluations of employee proficiency; however, it should not be used as a checklist for employees' behaviors.

Licenses, Certifications, and Training

The Logistics COI has identified several licenses and certifications (Table 4) that are applicable to the 5704 series. They are either mandatory or recommended according to your command and billet. Work with your supervisor to ensure you meet command licensing and certification training requirements.

Table 4. Certifications

Certification / Program	Vendor
Forklift License	Base Licensing
Electric Cart License with different variant	Base Licensing
Explosive Vehicle Operator License	Base Licensing
First Aid	Base Licensing
High Mobility Multipurpose Wheeled Vehicle (HMMWV) License	Base Licensing
Scrubber Sweeper License	Base Licensing
Medical Driver's Certification	Base Medical
Transportation Security Administration (TSA) Background Check	Homeland Security
Forklift Operator License	Installation Specific
Occupational Safety and Health Administration (OSHA) 10 Certification	Installation Specific
Scooter Operator License	Installation Specific
Shop License (Station Operations)	Installation Specific
Shop Operator License	Installation Specific
State Driver's License	State/Local

The Core training courses found in Table 5 and Appendix A below are recommended and may not be inclusive of all training available that are installation and state specific. The courses listed in the tables below align to both competencies in this learning map. Training titles and vendors are subject to change as the courses evolve. Additionally, several external resources (Defense Acquisition University (DAU), MarineNet, Lynda.com, etc.) provide a variety of training opportunities available to all personnel for professional knowledge and skill enhancement.

Table 5. 5704 Core Training

Core (All Levels)	
<ul style="list-style-type: none">• Forklift Hazard Perception Challenge - Advanced Safety Awareness• Forklift Hazard Perception Challenge - Basic Safety Awareness• Forklift Hazard Perception Challenge - DVD Training• Forklift Hazard Perception Challenge - Intermediate Safety Awareness	<ul style="list-style-type: none">• Forklift Operator Safety Training• Forklift Training Straight Truck Solutions: Loading & Unloading• Straight Truck Solutions: Loading & Unloading• The Forklift Workshop - DVD Training

Competency Model

A competency model is a group of competencies that together define successful performance in an occupation. The Logistics COI has adapted this model from the Department of the Navy (DON) Office of Civilian Human Resources (OCHR) for the 5704 series. The competency model, to include definitions, corresponding BIs, minimum proficiency target levels, and training has been provided in the charts below.

COMPETENCY	DEFINITION		
1. Direction and Comprehension	Understands, interprets, and carries out instructions involving tasks, decisions, policies, procedures, and directives during forklift operation.		
MINIMUM PROFICIENCY TARGET LEVELS			
Job Skill Level: Entry GS-5		Job Skill Level: Journeyman GS-6	Job Skill Level: N/A
2		4	N/A
BEHAVIORAL INDICATORS			
Entry	<ul style="list-style-type: none"> • Accomplishes work, orally or in writing, in accordance with instructions provided by work leaders, supervisors, and motor vehicle dispatchers. • Follows state, federal, local, and safety regulations (e.g., safety data sheet, first aid instructions, hazardous materials, and driving posted limits). • Follows trade requirements to accomplish assigned tasks. • Reports accidents and/or mishaps in accordance with current regulations. • Follows maintenance standards, manufacturer's specifications, and standard operating procedures. • Reports any observed or identified violations in accordance with established guidelines. • Follows oral instructions or written work orders concerning where and when loads are to be moved and placed. • Follows written instructions for the receipt, storage, and delivery of new materials. • Interacts with organization officials to gather products for a recycling program. • Interprets and apply instructions pertaining to material handling. • Interprets hand signals for the operation of forklifts. • Interprets rules and regulations regarding operation of forklift and other material handling equipment. • Interprets the layout of a storage area to be able to find and place items. • Reviews locations of organization roads and buildings to determine the best route to be followed. • Understands and follows hand/arm signals and/or oral and two-way radio instructions from ground guides. 		
Journeyman	<ul style="list-style-type: none"> • Ensures proper equipment and vehicles are available to accomplish assigned tasks. • Carries out directions from upper-level management. • Interprets instructions and communicates its relevance to assigned tasks. • Oversees work accomplished by other forklift operators. • Investigates and reports accidents and/or mishaps. • Ensures all standard operational procedures are followed. • Understands and follows hand/arm signals and/or oral and two-way radio instructions from ground guides. • Transmits messages on a two-way radio (e.g., respond to radio dispatch instructions, notify dispatcher of change in route) to inform on the status of job assignments or problems encountered. 		

COMPETENCY	DEFINITION		
2. Operational Safety	Exercises safe driving practices to ensure safe transport of materials while operating a forklift to prevent damage to property and/or injury to others.		
MINIMUM PROFICIENCY TARGET LEVELS			
Job Skill Level: Entry GS-5		Job Skill Level: Journeyman GS-6	Job Skill Level: N/A
2		4	N/A
BEHAVIORAL INDICATORS			
Entry	<ul style="list-style-type: none"> • Examines loads for even weight distribution to maintain safety and stability. • Identifies hazardous material to determine safe handling techniques during forklift operations. • Maintains safe operation of equipment to prevent damage to material or equipment. • Operates equipment in a safe manner to minimize violations due to employee error or negligence. • Places heavy and bulky items at the bottom of stacks to prevent tipping. • Reviews labeling of hazardous material containers to verify compliance with safety regulations. • Ties and secure loads for safe forklift operations. • Uses accepted safety practices and safety requirements when working with hazardous materials or explosives. • Uses hand and foot controls to move forward or reverse, lift, tilt, and lower loads in a safe manner. • Uses personal protective equipment (PPE) when operating forklifts to minimize exposure to potentially harmful physical or chemical agents. • Works in confined spaces safely when stacking and removing loads. • Estimates the stability of a forklift to determine gears, speed, turning, and maneuvering required to prevent overturning. • Drives a forklift safely over portal crane tracks and various terrain to maintain the safe transportation of cargo, equipment, and materials. • Maintains housekeeping and cleanliness of assigned vehicles and work areas. 		
Journeyman	<ul style="list-style-type: none"> • Examines loads for even weight distribution to maintain safety and stability. • Identifies hazardous material to determine safe handling techniques during forklift operations. • Maintains safe operation of equipment to prevent damage to material or equipment. • Operates equipment in a safe manner to minimize violations due to employee error or negligence. • Places heavy and bulky items at the bottom of stacks to prevent tipping. • Reviews labeling of hazardous material containers to verify compliance with safety regulations. • Ties and secure loads for safe forklift operations. • Uses accepted safety practices and safety requirements when working with hazardous materials or explosives. • Uses hand and foot controls to move forward or reverse, lift, tilt, and lower loads in a safe manner. • Uses PPE when operating forklifts to minimize exposure to potentially harmful physical or chemical agents. • Works in confined spaces safely when stacking and removing loads. • Estimates the stability of a forklift to determine gears, speed, turning, and maneuvering required to prevent overturning. • Drives a forklift safely over portal crane tracks and various terrain to maintain the safe transportation of cargo, equipment, and materials. • Maintains housekeeping and cleanliness of assigned vehicles and work areas. 		

COMPETENCY	DEFINITION		
3. Forklift Operation	Operates forklift to lift, load, and transport materials and equipment.		
MINIMUM PROFICIENCY TARGET LEVELS			
Job Skill Level: Entry WG-5		Job Skill Level: Journeyman WG-6	Job Skill Level: N/A
2		4	N/A
BEHAVIORAL INDICATORS			
Entry	<ul style="list-style-type: none"> • Exercises caution to avoid overloading and improper stacking. • Exercises caution when backing to load or unload material and equipment. • Maneuvers a forklift in close quarters or confined areas while maintaining the safety of cargo, equipment, and materials. • Operates a forklift to prevent spills or damage to material. • Operates forklift equipment in adverse road, traffic, and weather conditions. • Operates forklifts in confined spaces or narrow aisles. • Maneuvers a forklift to load and unload materials, hazardous waste, explosives, and equipment in warehouses and storage areas. • Delivers empty containers and blank labels to waste collection areas. • Operates forklift to load and unload cargo from vans, flatbeds, intermodal containers, or other transportation conveyances. • Place forks into pallets as far as possible to give the most support for heavy loads. • Calculates how high a load must be lifted to reach a shelf or bin. • Prepares pre-trip inspection report in accordance with regulations, policies, and procedures. • Completes simple arithmetic calculations to evaluate material weight against forklift load capacity. • Determines forklift size and capability to evaluate if it is able to lift the load. • Determines the manner and sequence of loading cargo to achieve load balance. • Moves, stacks, unstacks, loads, and unloads items for transport. • Performs daily maintenance on forklifts (e.g., checking oil, batteries, tires). 		
Journeyman	<ul style="list-style-type: none"> • Records material movements to keep track of the location and custody of the items. • Maintains inventory and control of items moved to prevent loss. • Inspects materials for accuracy and nonconforming. • Selects storage area for materials considering size, shape, and quantity. • Create and retrieve work orders. • Compares material movement documents against packages to verify current identification and quantity. 		

Appendix A: Training-to-Competency Mapping

CORE TRAINING	VENDOR	Direction & Comprehension	Operational Safety	Forklift Operation
Forklift Hazard Perception Challenge - Advanced Safety Awareness	J.J. Keller	√	√	√
Forklift Hazard Perception Challenge - Basic Safety Awareness	J.J. Keller	√	√	√
Forklift Hazard Perception Challenge - DVD Training	J.J. Keller	√	√	√
Forklift Hazard Perception Challenge - Intermediate Safety Awareness	J.J. Keller	√	√	√
Forklift Operator Safety Training	J.J. Keller	√	√	√
Straight Truck Solutions: Loading & Unloading	J.J. Keller	√	√	√
The Forklift Workshop - DVD Training	J.J. Keller	√	√	√
Forklift Training	Yancey	√	√	√

Appendix B: Acronyms Defined

◆ BI	Behavioral Indicator
◆ COI	Community of Interest
◆ DAU	Defense Acquisition University
◆ DoD	Department of Defense
◆ DON	Department of Navy
◆ HMMWV	High Mobility Multipurpose Wheeled Vehicle
◆ OCHR	Office of Civilian Human Resources
◆ OSHA	Occupational Safety and Health Administration
◆ PPE	Personal Protective Equipment
◆ TSA	Transportation Security Administration
◆ USMC	United States Marine Corps
◆ WG	Wage Grade