



2020 LOCK OUT / TAG OUT PROGRAM (LOTO)

Objective	Provide comprehensive and compliant TBCC Lockout / Tagout Program (LOTO)
Intended Audience	Bay Club Leaders, Facilities and Maintenance (Entire Program. Must be familiar with all aspects of LOTO) Affected Associates & All Other Associates (Basic - Page 1 and 2)
Required Documents	LOTO Training Guidelines, LOTO Training Participation Form (Authorized Associates: complete the form) Attendance Log (use for basic training of Affected and All Other Associates)

Associates must be trained before they are assigned to work under LOTO conditions, or whenever:

- ✓ There was a near miss or accident involving LOTO / Corrective Actions
- ✓ Periodic Inspections / Annual Update (ALL Associates)
- ✓ There are changes in equipment or procedures where lock out or tag out applies
- ✓ Construction work is taking place / See Circuit Breakers

DEFINITIONS PER [Title 8, CCR section 3314 \(control of hazardous energy\)](#)

- **Authorized Associate:** A qualified person who locks out or tags out specific machines or equipment in order to perform cleaning, repairing, servicing, setting-up, and adjusting operations on that machine or equipment. An affected employee becomes an authorized employee when that employee's duties include performing cleaning, repairing, servicing, setting-up and adjusting operations. *Qualified Person, Attendant or Operator (as per [T8CCR 3207, Definitions](#)): A person designated by the employer who by reason of his training and experience has demonstrated his ability to safely perform his duties and, where required, is properly licensed in accordance with federal, state or local laws and regulations.*
- **Affected Associate:** An employee whose job requires them to operate or use a machine or equipment on which cleaning, repairing, servicing, setting-up or adjusting operations are being performed under lockout or tag out, or whose job requires the employee to work in an area in which such activities are being performed under lockout or tag out. (Treadmill on Fitness Floor)
- **All Other Associates** whose work operations may be in an area where energy control procedures may be utilized must be instructed on the prohibition related to attempts to restart or reenergize machines or equipment which are locked out or tagged out.

INTRODUCTION: The Bay Club Company (“TBCC”) created this Lock out / Tag out Program (LOTO) to ensure the health and safety of its team and outside contractors who work at a Bay Club location. This program is written and intended to provide safety requirements when performing cleaning, repairing, servicing, setting-up, and adjusting of “any energized machines or equipment”. This is in accordance with [Title 8 of California Code of Regulations section 3314 \(control of hazardous energy\)](#).

Energized: Connected to an energy source or containing residual or stored energy.

Cord and Plug Connected Equipment: Equipment where the only energy source is electrical power provided by a plug in connection.

BAY CLUB LEADERSHIP RESPONSIBILITIES:

1. Train all existing (yearly & as needed), returning (first day back) and new (first day) associates– see “LOTO Training Guidelines”
2. Communicate with associates and encourage them to be more aware and obey safety rules
3. Report to Club General Manager and/or HR as necessary regarding any safety concerns
4. Implement the requirements of this LOTO program (*It’s The Law!*)
5. Use disciplinary actions (written warnings) when TBCC associates do not comply. Report failure to comply immediately
6. Enforce LOTO requirements when:
 - a. An Authorized Associate is working on “any energized machines or equipment” in order to perform cleaning, repairing, servicing, setting-up, and adjusting on machines or equipment (HVAC / Pool Pumps / Fitness Equipment, etc.)
 - b. An Affected Associate is working near equipment under LOTO
 - c. All Other Associates working in an area under Lockout / Tagout (maintenance / construction / renovation / demolition)
7. Training (document, document, document) – see “LOTO Training Guidelines” to access documents
 - a. Report any issues related to training immediately to GM and HR
8. Get feedback from your team on compliance
9. Document training, disciplinary actions, corrective actions – see “LOTO Training Guidelines” for where to store documents



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THE 5 MOST COMMON CAUSES OF INJURIES AND DEATH CONNECTED WITH LOCK OUT/TAG OUT:

1. Failure to shut off equipment
2. Failure to disconnect power source
3. Failure to release stored energy
4. Unexpected restarting of equipment
5. Failure to clear work area before restarting

PREVENT INJURIES AND DEATHS BY:

- Following LOTO procedures for a specific piece of equipment (see Operators Manual)
- Notifying affected workers of LOTO status on a specific equipment or area
- Using locks and tags on the energy isolating device
- Verifying that machines are safe to be serviced
- Removing tools and replacing safeguards after servicing is complete
- Clearing area of all employees before restarting equipment
- **Never remove or attempt to remove a Lock or Tag an authorized Associate has placed on a machine or equipment**

GENERAL LOCK OUT / TAG OUT PROCEDURES: **Before** working on repairing, adjusting, and/or replacing machinery and equipment, follow the steps below to place machinery and equipment in a neutral/zero mechanical state (release all energy):

1. Preparation for Shutdown
 - o Before an authorized Associate turns off a machine or piece of equipment, they must have knowledge of the type and magnitude of energy involved, the hazards of the energy to be controlled, and the means to control the energy.
 - o Notify affected Associates that the machinery, equipment, and/or process will be out of service.
 - o Review the machine or equipment Operators Manual for proper Lock out / Tag out Procedures.
2. Machine or Equipment Isolation
 - o All devices needed to control the energy going to/from the machine or equipment must be physically located and operated in such a manner as to isolate the machine or equipment from the energy source.
***Energy Isolating Device:** A mechanical device that physically prevents the transmission or release of energy. This includes: Valves, Breakers, Switches; Blank Flanges for piping systems; Restraining Devices to prevent movement of parts; etc.*
 - o There must be a waiting period to account for any coasting or stored gravity energy.
3. Locking and Tagging Device Application
 - o Authorized Associates must affix lockout or tag out devices to energy isolating devices. Lockout devices must be affixed in a manner that will hold the energy isolating devices in the "safe" or "off" position.
 - o Where tag out devices are used they must be affixed in such a manner that clearly states that the operation or movement of energy isolating devices from the "safe" or "off" positions is prohibited.
 - o Tag out devices must be attached to the same point a lock would be attached. If the tag cannot be affixed at that point, the tag must be located as close as possible to the device in a position that will be immediately obvious to anyone attempting to operate the device.
4. Locks and Tags
 - o Accident prevention signs, tags, padlocks, seals, or other similarly effective means, which may be required for cleaning, servicing, adjusting, repair work, or setting-up operations are available from the Maintenance Department.
 - o Signs, tags, padlocks, and seals must have means by which they can be readily secured to the controls. Tagout device attachment means must be of a non-reusable type, attachable by hand, self-locking, and non-releasable with a minimum unlocking strength of no less than 50 pounds.
 - o Examples of lock out devices:



Locks and tags for electrical panels



Switch lock and tag



Lock out tags



Breaker switch lock and tag



Lock out center – typically in maintenance shop



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5. Stored Energy

- Following the application of the lockout or tag out devices to the energy isolating devices, all potential or residual energy will be relieved, disconnected, restrained, and otherwise rendered safe.
- Where the re-accumulation of stored energy to a hazardous energy level is possible, verification of isolation will be continued until the maintenance or servicing is complete.
- Stored energy (capacitors, springs, elevated members, rotating fly wheels, and hydraulic/air/gas/steam systems) must be relieved or restrained by grounding, repositioning, blocking, and/or bleeding the system.
Hydraulic Energy: The energy derived from the motion and pressure of a liquid, such as water or oil.
Mechanical Energy: The energy of moving parts of a machine.
Pneumatic Energy: The energy derived from the motion and pressure of a gas, such as air.
Potential Energy: The stored energy that can be drawn upon to do work (e.g., suspended loads and compressed springs).

6. Verification of Isolation

- Prior to starting work on machines or equipment that have been locked or tagged out, the authorized Associate must verify that isolation or de-energization of the machine or equipment has been accomplished.
- After assuring that no Associates are or will be in danger, all lock and tag outs must be tested by following the normal start up procedures (per Operator's Manual recommendation).

7. Extended Lock out Tag out

- Should there be a shift change before the machinery or equipment can be restored to service, the lock and/or tag must remain.

8. Release from Lock out Tag out

- Before locks or tags are removed, and the energy restored to the machine or equipment, the following actions must be taken:
 - The work area must be thoroughly inspected to ensure that nonessential items have been removed and that the machine or equipment components are operational.
 - The work area must be checked to ensure that all Associates have been safely positioned or removed.
 - Before locks and/or tags are removed, affected Associates must be notified that the devices are being removed.
 - The Associate who applied the device must remove each device from each energy-isolating device.

PERIODIC INSPECTIONS

There must be a *periodic inspection* of the energy control procedure(s) *at least once a year* to evaluate their continued effectiveness and determine the necessity for updating the written procedure(s).

1. The periodic inspection must be performed by an Authorized Employee or person other than the one(s) utilizing the hazardous energy control procedures being inspected.
2. Where LOTO is used for hazardous energy control, the periodic inspection must include a review between the inspector and Authorized Employees of their responsibilities under the hazardous energy control procedure being inspected.
3. The employer must certify that the periodic inspections have been performed. The certification shall:
 - Identify the machine or equipment on which the hazardous energy control procedure was being utilized,
 - The date of the inspection,
 - The employees included in the inspection, and
 - The person performing the inspection.

Outside Contractors

Any outside Contractors working on TBCC property must comply with this plan. [Title 8, CCR section 3314 \(k\) \(control of hazardous energy\)](#): Whenever outside servicing personnel are to be engaged in activities covered by this section, the on-site employer's lockout or tag out procedures shall be followed.

TRAINING:

- (1) Authorized employees shall be trained on hazardous energy control procedures and on the hazards related to performing activities required for cleaning, repairing, servicing, setting-up and adjusting prime movers, machinery and equipment.
- (2) Each affected employee shall be instructed in the purpose and use of the energy control procedure.
- (3) All other employees whose work operations may be in an area where energy control procedures may be utilized, shall be instructed about the prohibition relating to attempts to restart or reenergize machines or equipment which are locked out or tagged out.
- (4) Such training shall be documented as required by [Section 3203](#).



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ADDITIONAL RESOURCES FOR MANAGERS AND TRAINERS:

- [CalOSHA PPT \(in pdf\)](#) from Safety Consultant for State of California Department of Industrial Relations – 43 Slides
- Videos:
 - English - [Click here](#): Machinery Lockout Tagout.Principles (11:52)
 - English - [Click here](#): Lockout Tagout Safety Procedure by Department of Labor and Industries, FedOSHA (16:58)
 - Spanish - [Click here](#): Bloqueo / Etiquetado de OSHA (13:58)
 - Spanish - [Click here](#): Etiquetado de Maquinas o Bloqueo Etiquetado (14:58)
- CalOSHA [ETools](#) is designed by CalOSHA to help companies and Trainers understand what lockout/tagout is and how to put into place effective procedures for a safer work environment. It includes real world examples of accidents, definitions, and in **practical language** the regulatory requirements from the *California Code of Regulations in Title 8 (T8CCR 3314)*. There are also "Best Practice" ideas to show how to fulfill the regulatory requirements and protect our Associates from the unexpected startup of machinery, equipment, and prime movers that could cause injury or death.
 1. [In the Real World](#)
 2. [Definitions](#)
 3. [When is Lockout/Tagout Required?](#)
 4. [Other Requirements](#)
 5. [Materials and Hardware](#)
 6. [Hazardous Energy Control Procedures \(HECPS\)](#)
 7. [Periodic Inspections](#)
 8. [Training](#)
 9. [Alternative Measures](#)

Records: All training, audit, and other records prepared in association with the Lockout/Tagout Program will be maintained by Human Resources and kept at TBCC's corporate office.

Please contact Human Resources with any questions | 888.830.7160 | hr@bayclubs.com