Flight Examiner Manual

Module 7.2 – AoC TRI / SFI (H)

Instructor SFI/TRI Assessment of Competence	V2023.1

General Applicable Framework

Flight rules:	VFR/IFR
Operational rules:	Applicable to the training session
Crew concept:	SPH / MPH
Equipment*:	Helicopter and/or FSTD (FFS / FTD 2/3)
Applicable type or class:	All
Assessment of Competence (AoC) conducted by:	Examiner SFE/TRE with a minimum experience of 3 years in the applicable helicopter category and have undergone specific training for the assessment of competence
Possible combination with other test or check:	No

Note (*): When an aircraft is used for the assessment, it should meet the requirements for training aircraft.

1. Introduction

Safety in Aviation relies heavily on the knowledge & operational quality of pilots

Therefore, the level of ability & pilot standard is linked to each individual pilot's professionalism and the quality of the Instruction they have received. This module compliments the standardisation requirements set out in Subpart J / Instructors of the Aircrew regulation in order to standardise an Instructor applicant for an initial, revalidation or renewal of an EASA instructor certificate.

The aim of this manual is to provide guidance to Examiners when conducting an Assessment of Competence for the SFI/TRI rating initial issue, revalidation or renewal. The assessment shall be performed on the same type of helicopter or FSTD used for the flight instruction.

This manual is also provided to give context & guidance and highlight the skill set required to be a competent Instructor. It does not intend to outline in detail how all training should be conducted.

This module should be used by the Examiner in conjunction with the appropriate FEM module for the test being conducted by the Instructor Applicant.

2. Test Administration

An Examiner with a minimum of 3 years Examiner experience and have undergone specific training or specifically tasked by the Instructor applicant's NAA may conduct the Assessment of Competence. The Instructor Applicant should provide the Examiner with advanced information regarding their chosen training session, in order to assess that the training session meets the criteria for the Assessment of Competence.

The Examiner should verify the Instructor Applicant's credentials and check documentation such as:

1. Valid ID or passport

2. Medical EASA class 1 or 2 (as applicable), for SFI no valid medical is needed

3. Applicable pilot licence and associated ratings (as applicable), for SFI no licence is needed

4. TRI / SFI course completion certificate (specifying single or multi-pilot training) from an ATO (for initial, as applicable)

5. Instructor seminar completion certificate from an ATO (for revalidation, as applicable)

6. Instructor refresher training certificate from an ATO (for renewal, as applicable)

Note: The assessment should consist of at least 3 hours of flight instruction related to the duties of an SFI on the applicable FFS or FTD 2/3.

Assessment Flight Crew Pairing Requirement

During the assessment of competence, the applicant occupies the seat normally occupied by the instructor (instructor's seat if in an FSTD or pilot seat if in an aircraft. The examiner, another instructor or, for MPH in an FFS, a real flight crewmember under instruction, functions as the 'student'.

3.   Examiner Briefing

The Examiner shall brief the following elements:

- Seek confirmation from the Instructor Candidate about the readiness and fitness to formally proceed with the Assessment of Competence (AoC).

- If there are any objections by the Instructor applicant and trainee(s) to the Examiner overseeing the training session.

- Confirm the aim and objectives for the Instructor Assessment of Competence.

- Discuss with Instructor candidate the exercises of the selected Assessment of Competence (AoC) training session and how the training objectives will be achieved.

- Examiner/Instructor applicant's PIC responsibility (if applicable).

- Examiner role in normal operations and (simulated) emergencies.

- Examiner should brief Instructor candidate, that the Examiner may sit away from trainees under training reducing pressure or perceived pressure.

- The Instructor Applicant is expected to display sound judgement, particularly when establishing any abnormal or simulated emergency exercise so that safety is never in doubt.

- Agree that on completion of the test, the Examiner and the Instructor Applicant will confer before starting the debriefing the outcome of the training session to the Trainee(s). This allows the Examiner to ensure a correct assessment is made by the Instructor candidate & Trainee(s) are given the correct assessment relating to their performance.

- Remind the Instructor Applicant that the briefing and de-briefing are to be directed to the Trainee(s). The NAA Inspector or (3-year experience) Examiner will emphasise that they will take no part in the conduct of the detail.

- Ask the Instructor Applicant if they have any questions and confirm that they have been adequately briefed.

- Examiner should orientate and position themselves, in order not to allow trainee(s) to bypass the candidate Instructor and dilute or influence the Assessment of Competence outcome.

4. Instructor Applicant Simulator/ Flight Briefing

The Instructor Applicant should be allowed to brief the Trainee(s) uninterrupted following the guidance in the appropriate FEM test module. Trainee(s) must have a clear start and finish in any training event, a good briefing is therefore a key element. The trainee(s) must be aware what the Candidate Instructor wants them to learn, this will allow an accurate assessment to determine if the training has been successful.

The briefing should include at least the following elements:

- The Instructor Candidate must accomplish a short introduction creating a calm and professional training environment;

- A health and safety briefing in the briefing room and Aircraft or Simulator;

- Asking if there are any questions trainee(s) may have from previous sessions needing clarity;

- Aims and objectives of the training session;

- Training exercises and exercise objectives to be met;

- The Instructor candidate must communicate the criteria of any particular training scenario clearly to the trainee(s);

- Student experience level should be considered what knowledge and skills should already be expected in place for the stage of training;

- The Instructor candidate must consider what is the most appropriate method of training;

- Instructor candidate may review previous training forms/records to assess the areas of development;

- Where possible training aids should be used to augment verbal instructions and maximise long term memory retention;

- At the conclusion of the briefing review the objectives and cover the main points of the briefing. Use a questioning technique appropriately to evaluate knowledge and understanding;

- Allow time for the conclusion and student downtime prior to the beginning of the training exercise;

- Instructor candidate should promote an instinctive use of CRM philosophy by the trainee(s), this should be intergraded and interwoven throughout the training;

- Development of Threat and Error (TEM) philosophy and Airmanship should be taught and promoted to enhance safety culture;

- Instructor candidate must focus on displayed handling characteristics of all handling exercises and demonstrate the ability to transfer Instructor experience effectively to trainees;

- The Instructor candidate should develop monitoring skills and knowledge and promote active monitoring skills by the Pilot Monitoring (PM);

- Freedom for the Trainee to ask questions;

5. Instruction in the FSTD/Flight

- The Examiner should be satisfied that the Instructor applicant demonstrates adequate knowledge and skills associated with the function of an instructor in the FSTD or flight;

- The Instructor applicant should demonstrate correct judgement and instructional technique allowing students to practice using an appropriate blend of direct instruction in the FSTD or flight and allowing practice by using trial and error;

- Instructor patter demonstration should allow trainee(s) to gain additional knowledge via an appropriate patter technique, whereby trainee(s) gain knowledge from imitation;

- Instructor applicant should deliver constructive developmental feedback which will help to reduce or eliminate errors;

- Time management and pace of exercises is appropriate and avoids tendency of rushing;

- Instructor candidate should be capable of recognising student errors;

- Instructor candidate should establish the root cause of errors and prioritise major errors first and minor errors secondly;

- Instructor candidate should at all times keep the training environment positive;

- Instructor candidate must not deliver negative training or negative transfer of training to trainee(s);

- Instructor candidate must be capable to deliver appropriate and timely instruction in a manner that does not increase workload, diminish capacity or confuse trainee(s);

- Instructor candidate should demonstrate the ability to observe, record, classify, evaluate and train to competence with intelligent use of repeats and sequencing;

- Instructor candidate must be aware of student fatigue and related consequences on training performance. Mental capacity may be reduced, the ability to handle stressful situations, multi-tasking and training performance may be impeded;

- Instructor candidate should effectively collate notes of the trainee(s) performance during training events;

- Instructor candidate should not over-prompt trainee(s) and establish a balance of support for all trainee(s);

6. Assessment of Competence

The following tables are designed to give the Examiner guidance when assessing the competency of the Instructor Applicant during the Assessment of Competence (AoC). The assessment items are stated in the left column. Expanded guidance and additional explanations are provided in the right column. This will aid the Examiner when debriefing the Instructor Applicants performance and analysing each section of the test in relation to specific competencies required for a successful outcome.

Section 1 - PRE-FLIGHT Briefing	
1.1 The objectives of the training session	
1.2 Roles of Instructor candidate	• The Instructor Applicant provides a logical structure with relevant training aims & objectives, set for the trainee(s) level of knowledge/ progress to enable understanding for the training session.
1.3 Climate conducive to learning	• Defines clearly what is expected of trainee(s), roles and expectations are well established.
	• Invites questions.
	• Generates a positive and constructive atmosphere to learning.
1.4 Preparation and planning	• Well prepared with briefing adapted to meet trainee needs.
	• Briefing materials or other visual mediums are well used to enhance the briefing.
1.5 Presentation technique	• All briefing items comprehensively and constructively delivered.
	• Trainee level of knowledge and understanding ascertained.
	• Answers questions from the trainee(s) and provides references to books where applicable.
1.6 Instructional technique	• Generates a high level of engagement and positive interaction with trainees.
	• Integrates CRM & TEM knowledge and understanding of a proactive and defensive philosophy, developing airmanship and situational awareness.
1.7 Integration & development of airmanship, CRM and TEM	• Develop crew synergy and how they interact, function together as crew.
	• Strive to impart highest level of knowledge, to give trainee(s) on what, where and how to develop knowledge.
1.8 Interaction with trainees	• Instructor candidate has required level of training oversight.
1.9 Ability to correctly observe, record and evaluate	

Section 2 - Conduct of Training session

2.1	**The need to give the 'trainee' precise instructions**	• *The Instructor Applicant should maintain the necessary free flow of communication with the trainee(s).* • *Comprehensively observes the Trainee(s) conduct and performance.*
2.2	**Responsibility for safe conduct of the flight/simulator session**	• *Conducts a flight/simulator safety briefing, maintaining situational awareness and intervention to maintain safety.* • *Standard and realistic use of R/T demonstrated by Instructor applicant, developing correct phraseology and use of radio procedures.*
2.3	**Intervention by instructor, when necessary**	• *Correct identification of errors with the use of root cause analysis* • *Skilled use of repeats for maximum training value and building confidence of the trainee.*
2.4	**Correct use of Radio Telephony (RT)**	• *Timely correction of errors with correct decision whether to review, repeat or defer exercise.* • *Integration of standard operating procedures (SOP's) appropriate for the stage of training, developing capacity and promote crew synergy.*
2.5	**Correction of errors and techniques**	• *Develop pro-active Pilot Monitoring (PM) skills.* • *FSTD realistic training environment created, promoting the development of crew awareness.* • *FSTD IOS operation that allows smooth transition between exercises and where possible, keeping a realistic line orientated training environment.*
2.6	**Application of standard operating procedures (SOP's)**	• *FSTD intelligent use of flight or position freeze, holding fix and repositioning to efficiently maximise time available.* • *Demonstrates the ability to promptly recognise any unwanted and unplanned events and mitigate training impact.*
2.7	**Simulator handling and Instructor operating Station (IOS) management**	• *Demonstrates best possible practise, avoiding the development of an unsafe situation.* • *Create a realistic ATC environment and promote correct ATC phraseology. Realistic ATC communication and vectoring.*
2.8	**Handling of simulator/aircraft deficiencies/ problems**	• *Allows trainee(s) to develop their own crew decision making and situational awareness.* • *Role play realistically of other agents and realistic response to crew actions.*
2.9	**Positioning and use of airspace**	• *Flexible sequence management of tasks to maximise the training outcome.* • *Avoids time pressure, leading to negative training.*
2.10	**Interaction with trainees**	• *Promote the Aviate, Navigate and Communicate (ANC) philosophy.* • *Promote & develop an instinctive use of Threat and Error (TEM) philosophy throughout all stages of operation.* • *Develop CRM skills that promote crew synergy and negate a steep cockpit gradient.*
2.11	**Time management and pace to achieve training objectives**	• *Demonstrates an exemplary knowledge of aircraft systems, procedures and background knowledge.*

2.12	Integrate threat and error management and crew resource management	• Familiar with available reference material and locates information easily.
2.13	Technical and procedural accuracy	• Ability to adapt training technique or style to maximise training effectiveness.
		• Facilitates learning using a motivating, patient and confident manner.
		• Encouraging mutual support, developing leadership and teamwork.
2.14	Instructional technique	• Communicates relevant knowledge clearly and effectively.
		• Effectively executes patter demonstration exercises and one on one coaching.
		• Remains calm, professional and consistent at all times.
2.15	Intervention techniques	• Appropriate intervention techniques used to explain, highlight or facilitate understanding and safeguard safety.
		• Takes clear, accurate and effective notes during exercises.
2.16	Keeping factual and unobtrusive notes	• Compiles contemporaneous notes as required.
		• Related applicable appendix A -AMC1-FCL .920 items
2.17	Additional demonstration exercises related to the applicable instructor certificate	

Section 3 - Trainee Assessment

3.1	Questioning and interaction with trainee(s)	• The Instructor applicant questioning should refer to the training objectives given in the relevant training session.
		• Fully at ease with assessing the required minimum performance for the training session and identifying performance to the trainee(s).
		• Grading closely agrees with observed performance.
		• Clear evidence gathered to support the trainee's assessment.
3.2	Trainee assessment/ grading	• Identifies in-depth root causes of observed trainee performance.
		• Assesses overall trainee performance including any non-technical performance to upskill the trainee(s) standard.
		• Consistently identifies good as well as poor trainee performance.
		• Comprehensive knowledge of company behavioural markers displayed when making an assessment. (if applicable)

Section 4 – FSTD/FLIGHT Debriefing

4.1	**Presentation and discussion of observations**	• *The Instructor applicant should demonstrate the ability to conduct a fair, unbiased debriefing of the trainee's performance based on identifiable factual items.*
4.2	**Progress review**	• *Assesses and encourages trainee self-assessment, provides clear and constructive feedback.* • *Compares individual outcomes/performance in relation to the defined objectives.* • *Capable of identifying individual differences in learning rates.*
4.3	**Training evaluation**	• *Ability to apply corrective action/advice to trainee(s), when required.* • *Integrates non-technical (NONTECHS) and behavioural markers into all aspects of the observed progress.* • *Checks for understanding and summarises learning points of the exercises covered.*
4.4	**Structuring and time planning**	• *Maintains awareness of the trainee's welfare. Ability to highlight good training performance.* • *Clear understanding of root causes in case of underperformance or lack of progress.*
4.5	**Reporting outcome**	• *Proficient level of facilitation, always moving the debrief in the required direction to improve trainee(s) competencies.* • *Capable of making a challenging training session a positive experience by adding value in the session and debriefing.*
4.6	**Presentation technique**	• *Augment verbal instruction by the use of applicable training aids to enhance understanding and long-term memory retention.* • *Instructor applicant avoids a chronological debriefing order.* • *Demonstrates ability to clearly and concisely show the root cause of training events.*
4.7	**Clarity of Explanation**	• *Integrates TEM and CRM throughout the debriefing, developing airmanship.* • *Instructor applicant creates an environment that allows a free flow of questioning.*
4.8	**Student participation**	• *Encourage self-assessment and self-evaluation developing trainees own critical awareness. Maintain balance as trainee(s) may be over self-critical.*

Section 5 - Recording of Documentation

5.1	**Training form**	• *The Instructor applicant demonstrates the ability to complete the relevant records correctly.* • *Demonstrates adherence and completion of all exercises as directed by the training syllabus.*
5.2	**Trainee file/folder**	• *Main points summarised and accurate description of the facts.* • *Reporting is objective, well described and comprehensive.*
5.3	**notification of any repeated or deferred items**	• *Demonstrates adherence and completion of all exercises as directed by the trainee syllabus.*

Section 6 - Demonstration of Theoretical Knowledge

6.1	**The Instructor Applicant should demonstrate to the Examiner a satisfactory knowledge with the function of SFI/TRI**	• *Displays a good background level of theoretical knowledge.* • *Good knowledge of procedures and phraseology.* • *Able to practically apply knowledge to benefit trainee.* • *Familiar with available reference material and locates information easily.*

7. Standard of Completion

Please refer to the General section 3.0 for the applicable FEM test module for the training session being conducted by the Candidate.

8. Competence Assessment Guidance

The assessment of instructors should be made against the following performance standards:

Competence	Performance	Knowledge
Prepare resources	(a) ensures adequate facilities; (b) prepares briefing material; (c) manages available tools; (d) plans training within the training envelope of the training platform, as determined by the ATO (Note: See GM1 ORA.ATO.125 point (f)).	(a) understand objectives; (b) available tools; (c) competency-based training methods; (d) understands the training envelope of the training platform, as determined by the ATO (Note: See GM1 ORA.ATO.125 point (f)) and avoids training beyond the boundaries of this envelope.
Create a climate conducive to learning	(a) establishes credentials, role models appropriate behaviour; (b) clarifies roles; (c) states objectives; (d) ascertains and supports student pilot's needs.	(a) barriers to learning; (b) learning styles.
Present knowledge	(a) communicates clearly; (b) creates and sustains realism; (c) looks for training opportunities.	teaching methods
Integrate TEM and CRM	(a) makes TEM and CRM links with technical training; (b) for aeroplanes: makes upset prevention links with technical training.	(a) TEM and CRM; (b) Causes and countermeasures against undesired aircraft states
Manage time to achieve training objectives	Allocates the appropriate time to achieve competency objective.	syllabus time allocation
Facilitate learning	(a) encourages trainee participation; (b) shows motivating, patient, confident and assertive manner; (c) conducts one-to-one coaching; (d) encourages mutual support.	(a) facilitation; (b) how to give constructive feedback; (c) how to encourage trainees to ask questions and seek advice

Assesses trainee performance	(a) assesses and encourages trainee self-assessment of performance against competency standards; (b) makes assessment decision and provides clear feedback; (c) observes CRM behaviour.	(a) observation techniques; (b) methods for recording observations.
Monitor and review progress	(a) compares individual outcomes to defined objectives; (b) identifies individual differences in learning rates; (c) applies appropriate corrective action.	(a) learning styles; (b) strategies for training adaptation to meet individual needs.
Evaluate training sessions	(a) elicits feedback from student pilots; (b) tracks training session processes against competence criteria; (c) keeps appropriate records.	(a) competency unit and associated elements; (b) performance criteria.
Report outcome	Reports accurately using only observed actions and events.	(a) phase training objectives; (b) individual versus systemic weaknesses.

9.   Decision Making Flow Chart

N/A

10. Training session Examiner Assessment of Competence (AoC) debriefing

The Instructor candidate must conduct a session de-briefing having the capacity to move between facilitator and Instruction technique, as facilitation is the key skill for the Instructor.

When facilitation is used correctly, this should be the catalyst to trigger trainee(s) self-analysis with constructive developmental Instructor feedback.

The Examiner should discuss the performance assessment with the Instructor Applicant before the trainee(s) is/are debriefed and informed of the progress. Focus should be on main key points ie. What went well and what needs reviewing.

Instructor candidate should create a training form/record with due diligence that;

1. Support trainee(s) honest, factual and constructive needs and performance.

2. Subsequent instructor and training management can use and identify what occurred and why.

3. Can be used as a permanent training record for Regulatory and Training Organisation requirements.

The examiner will discuss the overall performance assessment with the instructor candidate.

If the examiner agrees with the Instructor candidate assessment, the Instructor candidate should proceed with the de-briefing.

If the Instructor candidate assessment is different from that of the Examiner, the grading and trainee performance should be discussed.

When the Examiner is satisfied that all training objectives have been achieved and correctly graded, the Instructor Applicant should carry out the de-briefing as per the applicable FEM module and if all other aspects of the assessment are satisfactory the Assessment of Competence may be assessed as a 'Pass'.

If the Examiner is not satisfied that the Instructor Applicant has demonstrated the required standard in the conduct of the training session or failed to achieve the training objective(s), the Examiner should de-brief the Candidate and complete the paperwork.

11. Completion of all applicable records

All relevant NAA records must be completed.

For a failed Assessment of Competence, the justification for failure must be printed on the examiner report. The ground for failure must be clear and based on factual evidence. Any retraining recommendation should equally be written in the examiner report.