MAXFLI AVIATION

TRI Course Part 1

Type Rating Instructor development pack

MaxFli Aviation · London · available worldwide

Aligned to ICAO Doc 9995 (Ch 6.3 / Ch 7) and UK CAA Standards Document 29 v9.1

September 2026

Disclaimer. Working training materials for ATO/instructor development; not a full CAA-approved EBT/CRMT programme by itself. Verify against current official publications.

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About this pack

MaxFli Aviation — TRI Course Pack

Type Rating Instructor (TRI) Development Programme
Evidence Based Training (EBT) · Pilot Competencies · Facilitator Skills

Provider: MaxFli Aviation
Training delivery: MaxFli Aviation
Base: London · Available worldwide
Language: British English

Purpose

This pack equips an aspiring TRI to instruct on type with a modern, competency-based and EBT-aligned approach. It is instructional design material for MaxFli contracted delivery — not a regulatory manual. Always cross-check the applicable Authority (CAA / EASA / other) and AOC / ATO requirements for the specific type and State of registry.

Who this pack is for

- Aspiring TRI candidates preparing for TRI course and assessment
- MaxFli contracted TRIs delivering or refreshing TRI development training
- Training managers who need a coherent syllabus map for TRI development with EBT and competencies woven through

Pack contents

Path	Content
Course Overview	Aims, entry requirements, duration, regulatory framing, learning outcomes
Course Overview	Branded course overview hub (pair with Course Overview)
Module Map	Teaching modules 01–08: hours and competency focus for the TRI candidate
Teaching modules 01–08	Core instructional content (deliver these)
Module 01 — Role of the TRI	TRI role, instructional mindset, professional standards
Module 02 — Pilot Competencies for Instructors	Observing, noting, facilitating against competencies
Module 03 — EBT Philosophy and Design	EBT phases, programme design for type training
Module 04 — Briefing and Debriefing	Competency-led briefs and debriefs
Module 05 — Scenario-Based and Tailored Training	Designing SBT / tailored sessions
Module 06 — Assessment and AoC Judgement	Assessment, AoC-style judgement, note-taking
Module 07 — TEM and Facilitation	TEM, threat generation, facilitation vs instruction
Module 08 — Practical TRI Skills	Seat swap, intervention, FFS techniques
Reference / alignment 09–12	Compliance companions (auditor mapping — not the teaching sequence)
Alignment — ICAO Doc 9995	Doc 9995 compliance/mapping matrix (instructor + EBT conduct)
Alignment — CAA SD29	UK CAA SD29 v9.1 HF/CRM / Part FCL instructor mapping
Alignment — CAA Pilot Competencies	CAA public pilot competencies + MaxFli instructional 8 ↔ CAA OB crosswalk
Who may deliver a TRI course & TRI AoC	Who may deliver a TRI course; initial vs revalidation TRI AoC
Lesson plans (LP-01–LP-08)	Sample classroom and simulator lesson plans (incl. Day-2 LP-07/LP-08; LP-02 role-play brief)
Worksheets	Observation, notes, self-reflection, feedback, scenario cards, borderline cases
Assessment — Course Completion Checklist	TRI candidate course completion checklist

How to use this pack

1. **Course directors** — Start with Course Overview and Module Map. Confirm local regulatory and ATO approvals before scheduling.
2. **Instructors delivering the TRI course** — Teach modules **01–08** in sequence (or as mapped). Use **09–12** as compliance companions for auditor mapping, not as the teaching sequence. Use the Lesson plans (LP-01–LP-08) for day-by-day delivery (LP-07 EBT design; LP-08 scenario peer review; LP-03 includes a short TEM/intervention clinic). Keep worksheets printed or digital for each candidate — including Worksheet — Scenario Cards and Worksheet — Borderline Cases where mapped.
3. **TRI candidates** — Read the overview and competency module before Day 1. Complete self-reflection worksheets after each sim session. Use the observation sheet when watching peers.

4. **Assessment** — Use Assessment — Course Completion Checklist as the gate for course sign-off. Competency and EBT behaviours must be evidenced, not only manoeuvre ticks.
5. **Brand / presentation** — Use Course Overview together with Course Overview for a polished overview suitable for client or candidate induction.

Design principles (woven through every module)

- **Competency-based** — Instruct and assess against pilot competencies and observable behaviours, not manoeuvre tick-boxes alone.
- **EBT structure** — Evaluation → Manoeuvres → Scenario-based phases; tailored training where evidence supports it.
- **Facilitator role** — TRI as facilitator of learning; guided discovery preferred over lecture when safety and time allow.
- **TEM** — Threat and Error Management as a continuous instructional theme.
- **Original MaxFli content** — Frameworks referenced by name (e.g. ICAO Doc 9995, UK CAA SD29 v9.1, EASA/UK Part-FCL TRI, ICAO pilot competencies) at high level only. Paraphrase and cite by section. Do not paste protected manuals into delivery.

Suggested delivery shape

5-day programme: classroom theory + practical FFS / FTD instructional practice (see course overview for hour breakdown). Adjust for type, Authority, and candidate experience (e.g. SFI path, previous instructional background).

Brand colours (MaxFli)

- Navy: #0b1f4a
- Electric blue: #1f6fff / #2f8cff
- White / silver accents

Disclaimer

This pack supports MaxFli Aviation TRI development training. It does not replace the approved TRI course syllabus, FCL requirements, or Operator / ATO Operations Manual Part D. Instructors remain responsible for compliance with the State of licence issue and the organisation under which training is conducted.

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Course design

Course Overview

Course Overview — MaxFli Aviation TRI Development Programme

Evidence Based Training · Pilot Competencies · Facilitator Skills

1. Aims

By the end of this course, the TRI candidate will be able to:

1. Instruct type rating and recurrent training on the relevant aeroplane type in accordance with organisational and Authority requirements.
2. Apply **Evidence Based Training (EBT)** thinking — **Evaluation phase**, **Manoeuvres training phase**, and **Scenario-based training phase** — to session design and delivery (Doc 9995 Part I, Ch 7 terminology).
3. Observe, note, and facilitate against an **ICAO-aligned pilot competency set**, using observable behaviours and objective evidence rather than manoeuvre tick-boxes alone (aligned with Doc 9995 Part I, 6.3.3).
4. Brief and debrief as a **facilitator**, developing trainee insight and tailored training needs.
5. Integrate **Threat and Error Management (TEM)** into scenario design, intervention, and debrief.
6. Demonstrate practical TRI skills in the Full Flight Simulator (FFS): seat craft, intervention, instructional control of the session, and safe transfer of control.

MaxFli emphasis: Professional airline standards, practical and assessable, suitable for worldwide contracted delivery through MaxFli Aviation.

2. Entry requirements (aspiring TRI)

Typical gates (confirm against Part-FCL / national implementing rules and the ATO / Operator OM-D):

Requirement	Guidance
Licence	Valid ATPL (or CPL where the Authority permits the TRI path) with type rating on the aeroplane type concerned (or as otherwise approved)
Experience	Meet Authority minima for TRI (hours on type / total / PIC as applicable)
Recency	Current on type or within approved revalidation path; medical valid
Instructional readiness	Motivation and aptitude for instructor role; English at operational level for training delivery
Company / ATO	Nomination or acceptance by the ATO / Operator conducting the TRI course
Pre-course	Familiarity with company SOPs, TEM concepts, and basic adult learning principles (pre-reading from this pack recommended)

Note: SFI / SFE pathways and restricted TRI privileges (e.g. FFS-only) follow the Authority's specific provisions. MaxFli delivery adapts the pack to the candidate's privilege target.

3. Suggested duration

Element	Suggested allocation
Classroom / CBT / facilitated workshops	**3 days** (~18–21 hours contact)
FFS / FTD instructional practice	**2 days** (~8–10 hours in-seat instructional time + brief/debrief)
Total typical programme	**5 days**

Flexible options:

- Condensed 4-day for experienced instructors converting to TRI on type.
- Extended 6–7 day where Authority or ATO requires additional teaching / assessment practice.
- Modular refresh for existing TRIs adopting EBT and competency-based methods.

Always schedule adequate **brief / debrief** time around sim slots; instructional skill is developed as much in the debrief as in the box.

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4. Regulatory framing (high level)

This course is designed to **align with**, not reproduce, the following frameworks:

- **EASA Part-FCL** — TRI privileges, training course structure, and assessment concepts (as applicable to the State / ATO).
- **ICAO Doc 9995** (*Manual of Evidence-based Training*, First Edition 2013) — instructor competence expectations (Part I, 6.3) and conduct of EBT sessions (Part I, Chapter 7), cited by section only.
- **ICAO pilot competencies** — Standard airline training competency set adapted for instructional observation and facilitation.
- **UK CAA Standards Document 29 Version 9.1 (Sep 2025)** — HF/CRM training and assessment guidance; Part FCL instructor competence to teach/assess TEM and CRM in the operational environment (cited by section only). See Alignment — CAA SD29.
- **Operator / ATO OM-D** — Local syllabus, standards, and Assessment of Competence (AoC) arrangements.

Scope note — Doc 9995 vs this TRI course

Doc 9995 primarily addresses **recurrent** pilot assessment and training within an operator EBT programme (Annex 6 context). This MaxFli TRI course prepares instructors to deliver **competency-based / EBT-aligned** training consistent with Doc 9995 instructor and conduct guidance (especially 6.3 and Chapter 7). **It is not by itself** an approved baseline or enhanced EBT operator programme. See Alignment — ICAO Doc 9995 for the Doc 9995 mapping matrix and residual ATO/Operator responsibilities.

For UK HF/CRM instructor expectations (Part FCL operational-environment teaching vs classroom CRMT), see Alignment — CAA SD29. This TRI course addresses TEM/CRM teaching and assessment in the **simulator/line** environment; it does **not** complete a Flight Crew CRMT classroom qualification.

Important: Deliver only under an approved ATO / Operator arrangement. Content in this pack is MaxFli original instructional design. Do not substitute it for the approved TRI course documentation lodged with the Authority.

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5. Learning outcomes

Knowledge

- Explain the TRI role, privileges, limitations, and professional standards.
- Describe the Doc 9995-aligned EBT session structure: **Evaluation phase**, **Manoeuvres training phase**, and **Scenario-based training phase** — and how coaching intensity differs in each (Part I, 7.3–7.6).
- Map training events to pilot competencies and TEM; treat **competencies as the aim** and scenarios as a vehicle.
- State principles of competency-based assessment versus tick-box manoeuvre checking.
- List the instructor focus areas paraphrased from Doc 9995 Part I, 6.3.3 (observe behaviours / evidence; correlate with outcome; highlight strengths; find root causes; protect safety margins).

Skills

- Conduct structured briefs and debriefs using competency language and guided discovery.
- Observe and record performance using observable behaviours; produce usable training notes.
- Design and run a simple scenario-based session with tailored threats and clear training objectives.
- Manage the FFS as TRI: seat swap, intervention, freeze/reposition strategy, and instructional prioritisation.
- Make and justify pass / further-training judgements in an AoC-style context (as TRI candidate demonstrating instructor judgement).

Attitude

- Adopt a facilitator mindset: develop the trainee, do not merely demonstrate and tick.
- Maintain professional standards, fairness, and psychological safety in the training environment.
- Treat TEM and competencies as continuous themes, not add-on modules.

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6. Competency set used in this pack

For instructional use (adapted wording — not a protected verbatim list):

1. Application of Procedures / Knowledge
2. Communication
3. Aircraft Flight Path Management — Manual Control
4. Aircraft Flight Path Management — Automation
5. Leadership and Teamwork
6. Problem Solving and Decision Making
7. Situation Awareness
8. Workload Management

Instructional themes also used: Professional Standards; Threat and Error Management (TEM).

For UK clients using the CAA public OB set (Application of knowledge and Application of procedures split; Situation awareness and management of information), see the MaxFli instructional 8 ↔ CAA crosswalk in Modules **02** and **11**.

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7. Assessment of the TRI candidate

See Assessment — Course Completion Checklist. Completion requires demonstrated instructional competence across classroom contribution, observed brief/debrief, and FFS instructional practice — judged against facilitator behaviours and competency-based methods, not only technical knowledge of the type.

Doc 9995 Part I, 6.3.4 expects a **formal competency assessment** in a practical session, supervised by a person nominated by the operator or ATO, **before** instructing in an EBT programme. MaxFli course completion is preparatory evidence toward that gate — not a replacement for it. Part I, 6.3.5 expects **annual refresher** training and periodic re-assessment of instructor competences; schedule those under the ATO/Operator OM-D after this course.

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8. Contact / delivery

MaxFli Aviation · Instructor training and examiner development
London-based · Available worldwide for contracted TRI development and type training support.

Who may deliver this course and conduct the TRI AoC

See Who may deliver a TRI course and conduct a TRI AoC for UK Part-FCL / CAA summary (ATO tutors, TRE (a)(5) for initial and revalidation AoCs).

Course design

Module Map

Module Map — MaxFli TRI Course

Suggested contact hours and competency focus **for the TRI candidate as instructor** (not the line pilot under training). Hours are indicative for a 5-day programme; adjust to ATO approval.

Teaching modules are numbered **01–08** to match the course files and hub.

Summary table

Module	Title	Hours	Primary competencies developed (TRI candidate)
01	Role of the TRI & instructional mindset	2.0	Professional Standards, Leadership & Teamwork, Communication
02	Pilot Competencies deep dive for instructors	3.0	All eight (observation & facilitation skill); Situation Awareness; Communication
03	EBT philosophy & programme design for type training	2.5	Problem Solving & Decision Making, Application of Procedures/Knowledge, Workload Management
04	Briefing & debriefing with competencies / EBT	3.0	Communication, Leadership & Teamwork, Situation Awareness, Problem Solving & Decision Making
05	Designing scenario-based / tailored training	2.5	Problem Solving & Decision Making, TEM theme, Workload Management, Application of Procedures/Knowledge
06	Assessment, AoC-style judgement, note-taking	2.0	Application of Procedures/Knowledge, Situation Awareness, Professional Standards, Communication
07	TEM, threat generation, facilitation vs instruction	2.0	TEM theme, Situation Awareness, Leadership & Teamwork, Workload Management
08	Practical TRI skills: seat, intervention, FFS	3.0 + sim	Flight Path (Manual & Automation) instructional control, Workload Management, Communication, Leadership & Teamwork
—	Lesson-plan practice & observed sessions	Embedded in Days 3–5	Integrated
—	Assessment / sign-off	1.0	Professional Standards

Classroom / workshop subtotal: ~18–20 hours
FFS instructional practice: ~8–10 hours (plus briefs/debriefs)
Total: ~5 days

Module intent (one line each)

Module	Intent
01	Establish who the TRI is for the trainee and the organisation; shift from expert pilot to instructor-facilitator.
02	Make competencies observable and usable in real time — evidence, strengths, root causes (Doc 9995 6.3.3).
03	Embed Doc 9995 Evaluation / Manoeuvres training / Scenario-based training phase logic into type and recurrent design.
04	Make brief and debrief the primary teaching tools — briefing objectives & structure (7.3), facilitated debrief (7.8).
05	Build scenario-based training that develops TEM; tailor from Evaluation evidence (7.6).
06	Judge fairly; gather objective evidence; root-cause thinking; AoC-style standards (6.3.3 / 7.7).
07	Use TEM/CRM deliberately in the operational environment; facilitation; SD29 §8 practice.
08	Execute the craft of the TRI in the simulator without compromising safety or learning.

Day flow (example 5-day)

Day	Focus	Modules / activities
1	Foundations	01 + 02 (start); adult learning; professional standards; observation exercise
2	EBT & design	02 (finish) + 03 + 05 (intro); **LP-07** / **LP-08** workshops; design a mini scenario
3	Brief / debrief & TEM	04 + 07; **LP-03** (incl. intervention-ladder clinic); peer debrief clinic
4	Sim instructional practice	08 + lesson plans (sim); observed instructional seats
5	Assessment craft & integration	06 + further sim; completion checklist; action plan

Competency coverage matrix (TRI as instructor)

Competency / theme	01	02	03	04	05	06	07	08
Application of Procedures / Knowledge	●	●	●	○	●	●	○	●
Communication	●	●	○	●	○	●	●	●
Flight Path — Manual (instructional)	—	●	○	○	●	○	○	●
Flight Path — Automation (instructional)	—	●	○	○	●	○	○	●
Leadership and Teamwork	●	●	○	●	○	○	●	●
Problem Solving and Decision Making	○	●	●	●	●	●	●	○
Situation Awareness	○	●	○	●	●	●	●	●
Workload Management	○	●	●	○	●	○	●	●
Professional Standards	●	○	○	○	○	●	○	●
TEM (theme)	○	●	●	●	●	○	●	●

● primary · ○ secondary · — not a focus

Link to lesson plans

Sample plans in Lesson plans (LP-01–LP-08) (LP-01–LP-08) map to this matrix. Use them as delivery templates; customise for type, FFS device, and candidate mix.

Module	Primary lesson plan(s)	Notes
01	LP-01	Classroom role & mindset
02	LP-02 · Observation Role-Play Brief	Observation practice; role-play if no video library
03	**LP-07**	Day-2 EBT design workshop (legacy detail redesign)
04	LP-03	Brief/debrief clinic; includes short Module 07 ladder practice block
05	**LP-08** · Worksheet — Scenario Cards	Scenario/template peer review
06	LP-06 · Worksheet — Borderline Cases	Judgement calibration
07	LP-03 (ladder clinic) · LP-05 (FFS)	TEM/facilitation theory in module; timed ladder practice in LP-03; FFS in LP-05
08	LP-04 · LP-05	FFS seat craft, intervention, IOS; classroom concepts in Module 08

Related pages

- Course overview
- CAA Pilot Competencies

- ICAO Doc 9995 alignment
- CAA SD29 v9.1 alignment

Core modules

Module 01 — Role of the TRI

Module 01 — Role of the TRI & Instructional Mindset

Duration: ~2.0 hours
Competency focus (TRI candidate): Professional Standards · Leadership & Teamwork · Communication

Learning objectives

By the end of this module the TRI candidate will be able to:

1. State the purpose of the TRI within type training, recurrent training, and organisational safety.
2. Distinguish the expert-pilot role from the instructor-facilitator role.
3. Describe professional standards expected of a MaxFli / airline TRI (fairness, preparation, confidentiality, modelling).
4. Identify when to instruct, when to facilitate, and when to intervene for safety or session integrity.

1. Why the TRI exists

The Type Rating Instructor is not primarily a “checker who also teaches.” The TRI:

- **Develops** pilots to operate the type safely and to standard under normal, abnormal, and emergency conditions.
- **Protects** the training system by applying consistent standards and accurate records.
- **Models** professional behaviour: CRM, TEM, SOP discipline, and calm under pressure.
- **Enables** the organisation’s competency and EBT ambitions by generating usable evidence of performance.

On type courses and in recurrent training, the TRI is often the trainee’s most influential contact with company culture. That influence is part of the job.

2. Privileges and boundaries (instructional framing)

Speak to privileges at high level only; always use the current Authority text and ATO OM-D:

- TRI privileges typically cover instruction for the issue, revalidation, and renewal of type ratings and related training (scope depends on restriction — e.g. FFS-only).
- Assessment of Competence and examiner privileges (TRE/SFE) are **separate**; do not blur roles in the trainee’s mind.
- The TRI remains accountable for **training safety** in the device and for honest reporting of performance.

MaxFli practice: If unsure whether an exercise sits within your privilege or the approved syllabus, stop and clarify with the Training Manager / Course Coordinator before improvising.

3. From expert pilot to instructor-facilitator

Expert pilot mindset	TRI facilitator mindset
“I know the right answer — I’ll tell them.”	“I’ll create conditions where they find and own the answer.”
Focus on the manoeuvre looking right	Focus on competencies that made the manoeuvre succeed or fail
Intervene early to keep the session tidy	Allow productive struggle within safe margins; intervene for safety or learning collapse
Debrief = list of errors	Debrief = guided review of decisions, TEM, and transferable behaviours
Success = ticks complete	Success = evidenced progress and clear next training need

Neither column is absolute. High-risk or time-critical items still need clear, directive instruction. The skill is **choosing the mode deliberately**.

4. Professional standards (instructional theme)

Expect and model:

- **Preparation** — syllabus item, device fit, weather/scenario files, trainee background, and competency targets known before the brief.
- **Punctuality and presence** — training time is expensive; respect it.
- **Fairness** — same standard for all; no favouritism; cultural and gender neutrality in language and feedback.
- **Psychological safety** — firm on standards, respectful of the person; no humiliation.
- **Confidentiality** — performance discussed on a need-to-know basis within the training system.
- **Honesty** — do not pass what is not safe or not to standard; do not invent evidence.
- **Currency of self** — maintain own technical and instructional standards; ask for standardisation when needed.

5. Stakeholders the TRI serves

1. **The trainee** — learning, confidence calibrated to reality, clear path forward.
2. **The crew pair** — balanced attention; avoid training one pilot at the expense of the other without intent.
3. **The Operator / ATO** — syllabus integrity, records, and safety outcomes.
4. **The Authority** — compliance and competence of licensed training.
5. **Future passengers and cargo** — the ultimate stakeholder; keep that frame when standards feel uncomfortable.

6. Instructional decision points (workshop)

Use these scenarios in class discussion:

1. Trainee repeatedly misses a SOP trigger but flight path remains safe. Facilitate or instruct?
2. Trainee is overloaded; next syllabus item is complex. Continue, simplify, or freeze and reset learning objective?
3. Peer TRI asks you to “go easy” on a friend. Response?

4. Trainee challenges a standard that is written in OM-B. How do you handle authority vs learning?

Capture answers against **Professional Standards** and **Leadership & Teamwork**.

7. Key takeaways

- The TRI's product is **competent pilots and usable training evidence**, not entertainment or friendship.
- Shift consciously into the **facilitator** role; keep directive instruction available when needed.
- Professional standards are non-negotiable and are taught by modelling as much as by words.
- Know your privilege boundaries; escalate ambiguity.

TEM / CRM in the TRI role (UK SD29 pointer)

Part FCL instructors are expected to teach and assess **TEM and CRM in the operational environment** (simulator and line context). That is part of being a TRI — not an optional extra. A separate **classroom Flight Crew CRMT** qualification is an Operator pathway if you will deliver dedicated classroom CRM (SD29 v9.1 §8 vs §6). Details: Alignment — CAA SD29 and Module Module 07 — TEM and Facilitation.

Instructor notes (for MaxFli delivery)

- Open with a short personal story of a TRI who changed your own behaviour (positive or cautionary) — keep it professional.
- Pair candidates to rewrite a "directive" debrief into a "facilitative" one.
- Link forward to Module 02 (competencies) and Module 04 (brief/debrief).

Core modules

Module 02 — Pilot Competencies for Instructors

Module 02 — Pilot Competencies Deep Dive for Instructors

Duration: ~3.0 hours
Competency focus: All eight competencies (as observation/facilitation tools) · Situation Awareness · Communication

Learning objectives

1. Explain why competency-based training and assessment outperforms manoeuvre tick-boxes alone.
2. Use an ICAO-aligned competency set as a practical observation frame in brief, session, and debrief.
3. Distinguish **observable behaviours** from vague impressions ("good CRM", "a bit behind").
4. Practice real-time noting: what happened → which competency → what to facilitate next.
5. Practise the instructor observation competences paraphrased from Doc 9995 Part I, **6.3.3**: gather objective evidence; correlate behaviour with potential outcome; highlight good performance; determine root causes for below-standard performance; identify eroding safety margins.

1. Why competencies matter for the TRI

Manoeuvre completion answers: *Did they fly the approach?*
Competency observation answers: *Why did that approach succeed or fail, and will the behaviour transfer?*

For the TRI, competencies:

- Give a **shared language** with trainees, examiners, and training management.
- Support **EBT** and tailored training by pointing to underlying strengths and gaps.
- Improve **fairness** — judgements anchored to behaviours, not personality.
- Make debriefs **transferable** — same themes appear in line operations.

2. The competency set (instructional adaptation)

Use the following as the working set for MaxFli TRI delivery. Wordings are instructional adaptations for observation and teaching — not a verbatim reproduction of any protected manual.

2.1 Application of Procedures / Knowledge

Instructional meaning: Applies published procedures, SOPs, limitations, and system knowledge correctly and in context.
Look for: Correct checklist discipline; appropriate use of QRH/OM; technical explanations that match the aeroplane; recognition when procedure A vs B applies.
Typical notes: "Selected wrong checklist branch"; "Explained hydraulic logic accurately under time pressure"; "Skipped required call."

2.2 Communication

Instructional meaning: Shares information clearly, listens, confirms, and closes loops — with crew, ATC (simulated), and cabin as required.
Look for: Standard callouts; readbacks; assertiveness without aggression; briefing clarity; silence when speech was needed.
Typical notes: “PF intention not stated before mode change”; “PM challenged effectively; PF acknowledged.”

2.3 Aircraft Flight Path Management — Manual Control

Instructional meaning: Controls the aircraft flight path manually with appropriate accuracy, energy, and smoothness for the phase of flight.
Look for: Pitch/power/trim coordination; path vs attitude priority; recovery technique; hand-flying under degraded modes.
Typical notes: “Stable path but high workload scan”; “Late correction on localiser; energy unmanaged.”

2.4 Aircraft Flight Path Management — Automation

Instructional meaning: Manages autoflight and related systems so that the aircraft path matches the clearance and plan; modes understood and monitored.
Look for: Mode awareness; appropriate level of automation; timely intervention when automation surprises; FMA discipline.
Typical notes: “FMA not verified after selection”; “Appropriate reversion to lower automation.”

2.5 Leadership and Teamwork

Instructional meaning: Directs and involves the crew to achieve the task; maintains an open climate; balances authority and participation.
Look for: Clear PF/PM roles; inclusion of input; conflict handling; setting priorities for the team.
Typical notes: “PM frozen out during non-normal”; “Good distribution of tasks in holding.”

2.6 Problem Solving and Decision Making

Instructional meaning: Identifies problems, generates options, decides, and reviews — with appropriate time horizon.
Look for: Diagnosis quality; option generation vs tunnel vision; decision communicated; review when conditions change.
Typical notes: “Committed early without considering fuel/weather option”; “Used time available to consult QRH and cabin.”

2.7 Situation Awareness

Instructional meaning: Perceives and understands the aircraft, environment, and crew state; projects ahead.
Look for: Position awareness; system state; weather/traffic; fuel/time; recognition of degrading margins.
Typical notes: “Lost track of MSA during vectoring”; “Anticipated holding fuel state correctly.”

2.8 Workload Management

Instructional meaning: Prioritises, plans, and manages task load; uses available resources; recognises overload.
Look for: Aviate–navigate–communicate priority; task shedding; use of automation/PM; pause/reset behaviours.
Typical notes: “Stacked tasks during configuration; callouts slipped”; “Asked for delay vectors — good load shed.”

Instructional themes (use alongside)

- **Professional Standards** — integrity, preparation, modelling.
- **TEM** — recognition of threats/errors/undesired states and management strategies (see Module 07).

2.9 Crosswalk — MaxFli instructional 8 ↔ CAA public OB set

MaxFli teaching Modules 01–08 and the worksheets use the **merged eight** above. Many UK operators adopt the CAA public pilot competency appendix (see Module 11), which **splits** Application of knowledge from Application of procedures and compliance with regulations, and names Situation Awareness as **Situation awareness and management of information**. Keep the instructional merge for classroom practice; use this map when the client or operator grades against the CAA set.

MaxFli instructional 8 (this module / worksheets)	CAA public OB competency (Module 11)
Application of Procedures / Knowledge	**Application of knowledge** *and* **Application of procedures and compliance with regulations** (split — record separately when the operator uses the CAA set)
Communication	Communication
Aircraft Flight Path Management — Manual Control	Aeroplane flight path management — manual control
Aircraft Flight Path Management — Automation	Aeroplane flight path management — automation
Leadership and Teamwork	Leadership and teamwork
Problem Solving and Decision Making	Problem solving and decision making
Situation Awareness	Situation awareness and management of information
Workload Management	Workload management

Professional Standards and TEM remain instructional themes alongside either set (Module 11 lists Professional standards as optional for some airlines). Always follow the ATO/operator dictionary in force for formal grading.

3. Observable behaviours vs labels

Weak note (avoid)	Stronger note (prefer)
Poor CRM	PF did not invite PM input before divert decision
Unstable	Became unstable at 800 ft: speed +15 kt, sink 1200 fpm; continued
Behind the aircraft	After ATIS change, still briefing old runway at 15 nm
Good knowledge	Correctly selected QRH procedure and explained rationale to PM

Rule: If a third TRI cannot picture what happened from your note, rewrite it.

4. Instructor competences for competency-based / EBT delivery (Doc 9995 Part I, 6.3.3)

Paraphrased MaxFli teaching points — cite the section; do not quote the manual:

Focus	What the TRI practices on this course
Competencies & behavioural indicators	Know the working competency set; measure what you see against the **operator/ATO grading system** when one is provided
Objective evidence	Observe behaviours; record facts that another instructor could recognise
Behaviour ↔ outcome	Link what you saw to the **likely operational outcome** if repeated on the line
Good performance	Deliberately **recognise and highlight** effective behaviours — not only gaps
Root causes	For below-standard performance, dig for **why** (competency/TEM), not only the symptom (e.g. "unstable")
Safety margins	Spot situations that could drive an **unacceptable reduction in safety margins** and intervene

Related expectations outside this pack's authority to grant: formal competency assessment before EBT instruction (**6.3.4**); annual refresher and periodic re-assessment (**6.3.5**) — ATO/Operator.

UK CAA SD29 v9.1 §10 (paraphrased): CRM/non-technical skills are assessed through **recognisable behaviours**. NOTECHS is one behavioural-marker system used by many operators (cooperation, leadership/managerial skills, situation awareness, decision-making). Under EBT/ATQP, technical and non-technical competencies are assessed together in the Evaluation phase (or equivalent). Use the **operator's** official markers/grading when provided; this module trains the observation craft, not a substitute dictionary. See Alignment — CAA SD29.

5. Observation technique for instructors

1. **Watch the flight path and the people** — both are data.
2. **Note facts first** — time/phase, what was said/done, aircraft state.
3. **Tag competency second** — one primary tag; secondary if needed.
4. **Park judgement** until you have enough samples (except safety interventions).
5. **Look for patterns** — one slip ≠ competency gap; repeated theme = training need.

Practical tip: In the box, use a simple two-column pad: *Event* | *Competency / TEM*. Transfer to the formal record in the debrief window.

6. Facilitating against competencies

In debrief, prefer:

- "Talk me through what you understood the automation was doing at that point." → **Flight Path — Automation / Situation Awareness**
- "What options did you see before you committed to the turn-back?" → **Problem Solving and Decision Making**
- "How did you want the PM to support you in that segment?" → **Leadership and Teamwork / Communication**

Avoid leading only with your conclusion. Guided discovery builds retention; then **confirm the standard** so the trainee leaves with a clear model.

7. Exercise — video or live observation (classroom)

Using a short sim replay or role-play (protocol without a video library: Observation Role-Play Brief; delivery: Lesson Plan LP-02):

1. Individually note three events with competency tags.
2. Compare in pairs — align language.
3. Agree one tailored training focus for a follow-on scenario.

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8. Key takeaways

- Competencies explain **performance beneath the manoeuvre** — competencies are the aim; manoeuvres and scenarios are vehicles.
- Notes must be **observable and specific** (objective evidence).
- Practise the full 6.3.3 set: evidence, outcome link, strengths, root causes, safety margins.
- The TRI uses competencies to **observe, decide training need, and facilitate** — not to decorate forms.
- Professional Standards and TEM sit beside the eight as continuous themes.

Instructor notes

- Provide the observation worksheet from Worksheets.
- If no ATO clip is available, run Observation Role-Play Brief.
- Do not distribute copyrighted competency dictionaries; use this instructional adaptation.
- Link to Module 04 (debrief language) and Module 06 (assessment evidence).
- Cross-check coverage in Alignment — ICAO Doc 9995 (Part I, 6.3.3) and Alignment — CAA SD29 (§10 observable CRM/NTS). Use §2.9 and Module 11 for the instructional 8 ↔ CAA OB crosswalk.

Core modules

Module 03 — EBT Philosophy and Design

Module 03 — EBT Philosophy & Programme Design for Type Training

Duration: ~2.5 hours
Competency focus: Problem Solving & Decision Making · Application of Procedures/Knowledge · Workload Management · TEM theme

Learning objectives

1. Explain Evidence Based Training at programme level (citing ICAO Doc 9995 by section only — no verbatim quotation).
2. Describe the Doc 9995-aligned session structure: **Evaluation phase**, **Manoeuvres training phase**, and **Scenario-based training phase** (Part I, 7.3–7.6) and how coaching intensity differs in each.
3. Map type-rating and recurrent events to competencies and training topics in a simple design sheet — **competencies as the aim**; scenarios as a vehicle.
4. State what “tailored training” and “training to competency” mean in practice for a TRI on the day.
5. State the honest scope: this TRI course aligns instructors with Doc 9995 conduct guidance; it is not itself an approved baseline/enhanced EBT operator programme.

1. EBT in one paragraph (MaxFli working definition)

Evidence Based Training uses operational data and competency frameworks to design training that develops and assesses the behaviours pilots need in real line operations — not only the ability to repeat prescribed manoeuvres. For the TRI, that means designing and delivering sessions where **evidence of competency** is generated, observed, and used to guide further training (**training to competency**; tailored emphasis from that evidence).

Reference framework by name: **ICAO Doc 9995**, *Manual of Evidence-based Training* (First Edition 2013). Cite Part I sections (e.g. 6.3, 7.3–7.8) in teaching — do not reproduce protected text. Delivery must still satisfy the applicable Authority and ATO syllabus for type training.

Scope reminder: Doc 9995 is written primarily for recurrent EBT programmes. This module teaches TRI candidates the **session-conduct and instructional logic** they will need when delivering EBT-aligned training. Approval of a full operator EBT programme remains with the Operator/ATO and Authority. See Alignment — ICAO Doc 9995.

2. Why type training benefits from EBT thinking

Traditional type courses can become:

- Long lists of items “seen” once.
- Little link between items and underlying competency gaps.
- Debriefs dominated by technique minutiae without TEM or decision-making.

EBT-aligned type / recurrent design aims to:

- Retain necessary **manoeuvre** competence (including regulatory manoeuvres).
- Add **scenario-based** opportunities where multiple competencies interact.
- Use **evaluation** phases to baseline and to inform tailored emphasis.
- Treat the TRI as **facilitator and evidence-gatherer**, not only demonstrator.

3. Three-phase structure (Doc 9995 Part I, Chapter 7 — paraphrased)

Briefings should make the **objectives** and **structure** of the session clear (Part I, 7.3): demonstrate at least the minimum competency standard across the relevant competencies; enhance handling skills; and strengthen the trainee's ability to prevent, mitigate, and manage relevant threats and errors. Structure the session as:

1. **Evaluation phase**
2. **Manoeuvres training phase**
3. **Scenario-based training phase**

(Local Authorities may approve a different sequence in some existing programme types — follow the ATO/Operator approved order.)

3.1 Evaluation phase (Part I, 7.4)

Purpose (paraphrased): Observe and assess flight crew competency; collect information that helps validate the training system; identify **individual training needs**.
Content character: Typically a **line-oriented** flight scenario with one or more occurrences that exercise key competency elements. Prefer identifying the **root cause** of any deficiency, not only the symptom.
TRI behaviour: The instructor **normally does not instruct or interrupt** — focus on observation, running the scenario, and playing external parties (ATC, cabin, etc.) where needed. Note deficiencies for later phases. If intervention is unavoidable, account for its effect on the performance observed.
Outputs: Baseline picture; input to tailored Manoeuvres training and Scenario-based training; system/learning data as required by the organisation.

3.2 Manoeuvres training phase (Part I, 7.5)

Purpose (paraphrased): Practise and develop the **handling skills** needed for critical flight manoeuvres to a defined proficiency against predetermined criteria.
Content character: Focus on critical elements of manoeuvres and associated procedures — **not** part of the line-oriented scenario.
TRI behaviour: Act as an **active trainer**, using learning opportunities while ensuring the desired competency level is achieved. Name the competencies involved (e.g. Manual Flight Path + Workload Management in a go-around).
Outputs: Confidence and competence in defined manoeuvres; record of completion to standard.

3.3 Scenario-based training phase (Part I, 7.6)

Purpose (paraphrased): Develop, retain, and practise competencies for effective **threat and error management**, so crews cope with both predictable and unforeseen situations.
Content character: Line-oriented scenarios in which one or more threats may be introduced; adapt content to develop weaker competencies identified in the Evaluation phase.
TRI behaviour: In contrast to Evaluation, the instructor **may intervene or interrupt** where needed to enable development of competence or to enhance learning. Facilitate; allow consequences within safe device use; debrief for transfer to the line.
Outputs: Evidence across multiple competencies; TEM capability; tailored follow-ups if needed.

Important: Phases can appear across a course, a recurrent cycle, or within a single sim detail. The TRI must always know **which phase they are in** and match coaching intensity accordingly. Competencies remain the **aim**; the scenario is a **vehicle**.

3.4 Assessment and debriefing (Part I, 7.7–7.8) — overview

After Evaluation, areas below the minimum competency standard become the focus of subsequent training. Debriefing should be a fair review based on observed actions and facts; announce the outcome early; use facilitated discussion so crews critique themselves; then provide clear feedback and recommendations. Detail and practice: Module 04.

4. Competency-based assessment vs manoeuvre tick-box

Manoeuvre tick-box	Competency-based (EBT-aligned)
Item done / not done	Behaviours observed across items
Same script for all	Emphasis adjusted to evidenced need
Pass if manoeuvres completed	Progress judged on competency evidence and safety
Debrief = corrections list	Debrief = patterns, TEM, decisions, next focus

Manoeuvres still matter. EBT does **not** mean abandoning raw data or regulatory items. It means not stopping at the tick.

5. Simple programme design sheet (type training)

For each training period, the TRI / designer should be able to answer:

1. **Phase?** Evaluation phase / Manoeuvres training phase / Scenario-based training phase
2. **Primary competencies?** (2–4 maximum for focus) — the aim
3. **Training topics / threats?** (e.g. weather, system degradation, time pressure, ATC complexity) — the vehicle
4. **Must-achieve manoeuvres?** (regulatory / company)
5. **Success look-like?** Observable outcomes / minimum competency standard
6. **Tailoring rule?** What will you change if Evaluation shows gap X or strength Y?
7. **Brief objectives?** Competency standard · handling · TEM (Part I, 7.3)

A one-page design sheet beats a vague “do exercise 7.”

6. Tailored training — practical meaning for the TRI

Tailoring is **not** inventing an unofficial syllabus. It is:

- Changing **emphasis**, **repetitions**, and **scenario threats** within approved objectives.
- Spending more guided practice where Evaluation showed need.
- Avoiding unnecessary drill where competence is already evidenced — freeing time for integration.

Example: Evaluation shows strong manual path control but weak automation mode awareness → Manoeuvres still cover required items, but Scenario and debrief weight **Flight Path — Automation** and **Situation Awareness**.

7. Workshop — redesign a legacy detail

Timed classroom delivery: Lesson Plan LP-07. Give candidates a traditional “items list” sim detail. In groups:

1. Label each block **Evaluation phase** / **Manoeuvres training phase** / **Scenario-based training phase**.
2. Assign primary competencies (aim) and threats/events (vehicle).
3. Add one tailored branch based on a fictional Evaluation result (weaker competencies → Scenario-based focus).
4. Mark where the TRI must **not** coach (Evaluation) vs may **actively train** (Manoeuvres) vs may **intervene to develop** (Scenario-based).

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8. Key takeaways

- Name the phases correctly: **Evaluation**, **Manoeuvres training**, **Scenario-based training** — and match instructional intensity (observe vs active train vs develop-by-intervention).
- Competencies are the **aim**; scenarios are a **vehicle**; train **to competency** with tailored emphasis.
- Keep manoeuvres; add competency evidence and TEM-rich scenarios.
- Design on a page before you enter the briefing room; brief objectives and structure (Part I, 7.3).
- This TRI pack aligns instructors with Doc 9995 conduct guidance — it does not approve an operator EBT programme.

Instructor notes

- Keep regulatory humility: local ATO may still require fixed item lists — show how to layer EBT thinking on top.
- Day-2 workshop: LP-07; deeper scenario craft next in Module 05 / LP-08.
- Preview Module 05 for deeper scenario design; Module 04 for briefing/debriefing (7.3 / 7.8).
- Use Alignment — ICAO Doc 9995 when a client or auditor asks “where is Doc 9995 covered?”

Core modules

Module 04 — Briefing and Debriefing

Module 04 — Briefing & Debriefing with Competencies and EBT

Duration: ~3.0 hours
Competency focus: Communication · Leadership & Teamwork · Situation Awareness · Problem Solving & Decision Making

Learning objectives

1. Deliver a time-efficient, competency-framed training brief aligned to Doc 9995 Part I, **7.3** (objectives + session structure).
2. Run a structured debrief using guided discovery, observable evidence, and clear standards (Part I, **7.8** paraphrased practice).
3. Balance trainee talk-time with TRI closure on what "good" looks like; announce outcomes early when assessing.
4. Link debrief outcomes to tailored next training (Evaluation → subsequent phases).

1. Brief and debrief as primary teaching tools

In competency / EBT delivery, the simulator is where evidence is created; the **brief sets the frame** and the **debrief consolidates learning**. A technically perfect sim with a poor debrief wastes the detail.

2. The training brief (practical structure)

Target time: 20–40 minutes depending on detail complexity (not a lecture marathon).

Suggested flow (aligned with Doc 9995 Part I, 7.3 — paraphrased)

1. **Admin & safety** — device, seats, emergencies, roles, timing.
2. **Objectives (7.3.1.1 style)** — make explicit that the crew should: demonstrate at least the **minimum competency standard** in the relevant competencies; enhance **handling skills** where planned; and strengthen **TEM** (prevent / mitigate / manage relevant threats and errors).
3. **Structure of the session (7.3.1.2)** — name the phases in order: **Evaluation phase** → **Manoeuvres training phase** → **Scenario-based training phase** (or the locally approved sequence), and say which blocks this detail will use.
4. **Competency focus** — max 3–4 for attention (competencies = aim).
5. **Threat picture** — what TEM themes may appear (without ruining useful surprise if Evaluation requires it).
6. **Standards** — what success looks like; company / regulatory non-negotiables.
7. **Trainee ownership** — invite questions; confirm understanding of PF/PM plan.
8. **TRI role today** — Evaluation: observe, normally no instruction/interruption; Manoeuvres training: active trainer; Scenario-based: may intervene to enable development.

Competency framing examples

- "We'll particularly watch **Automation path management** and **Communication** during the non-normal."
- "In the **Evaluation phase** I will normally not instruct or interrupt; intervene for safety only — so you're not waiting for coaching."
- "In the **Manoeuvres training phase** I will be an active trainer on the critical handling items."
- "In the **Scenario-based training phase** I may intervene to help you develop TEM and weaker competencies from Evaluation."

Brief pitfalls

- Reading the entire QRH aloud.
- Hiding the real objectives.
- Over-briefing manoeuvre technique that belongs in the **Manoeuvres training phase**.
- Failing to name the three-phase structure when the detail uses it.
- Ignoring the second crew member.

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3. The debrief (practical structure)

Target time: Often equal to or longer than useful teaching time in the box for complex scenarios — plan it.

Doc 9995 Part I, **7.8** (paraphrased for teaching): a successful debrief leaves trainees with a clear understanding of their performance, especially where it can improve; base the review on **observed actions and facts**; announce the **outcome early** (module complete vs additional training needed, and any effect on privileges as applicable); then use **facilitated discussion** so crew members critique themselves; provide feedback and specific recommendations.

Suggested flow (facilitated)

1. **Settle** — emotional temperature; short acknowledgement of effort.
2. **Outcome first (when assessing)** — clear statement: completed / additional training required (and why).
3. **Trainee self-assessment** — "What went well? What would you change?" (both pilots) — highlight good performance as well as gaps (6.3.3).
4. **Agree the timeline** — key events only; use notes; correct factual disputes calmly with device data if needed.
5. **Explore 2–3 themes** — tagged to competencies / TEM; guided discovery; dig for **root causes**, not only symptoms.
6. **State the standard** — after discovery, make the model explicit.
7. **Tailored outcome** — what to repeat, add, or reduce next (Evaluation needs → Manoeuvres / Scenario-based focus).
8. **Admin** — records, signatures, next detail objectives.

Question stems that work

- "What were you trying to achieve at that moment?"
- "What information did you have — and what was missing?"
- "If you faced this on the line tomorrow, what would you do differently?"
- "How did workload affect your communication there?"

Debrief pitfalls

- TRI monologue covering every jotting.
- Only negative points.
- Personality labels (“you’re too timid”) instead of behaviours.
- No link to next training.
- Arguing technique preference that is not SOP.

4. Matching debrief style to EBT phase

Phase	Debrief emphasis
Evaluation phase	Accurate baseline; root causes; agree individual training needs for later phases; little “re-teaching” of items that belong in Manoeuvres/Scenario
Manoeuvres training phase	Technique model clarity; confirm defined proficiency criteria met; fewer wide TEM digressions unless relevant
Scenario-based training phase	Integration, decisions, TEM, crew processes; how intervention supported development; transfer to line

5. Using notes in the debrief

- Lead with **patterns**, not a chronological prosecution.
- Offer **specific examples** to support each theme.
- Invite the trainee to tag competencies themselves — builds shared language.
- Record the agreed training need in the same competency vocabulary.

6. Practice clinic (classroom)

Pairs: 8-minute brief for a scenario detail → peer feedback against checklist (objectives, phase, competencies, TRI role).
Then: 12-minute debrief of a scripted event set → observers score facilitation vs lecture ratio.

7. Key takeaways

- Brief for **7.3 objectives** (competency standard, handling, TEM) and **three-phase structure**, plus TRI behaviour in each phase.
- Debrief for **outcome + insight + standard + next focus** (7.8); include strengths.
- Guided discovery first; clarity of standard second; root cause over symptoms.
- Notes serve themes, not vanity completeness.

Instructor notes

- Use Worksheet — Competency Notes in the clinic.

- Model one full MaxFli-standard brief live, then dismantle it against Part I, 7.3 headings.
- Pair with Alignment — ICAO Doc 9995 when auditors ask about briefing/debriefing coverage.
- Pair with Alignment — CAA SD29 for operational-environment CRM teaching and facilitation / self-analysis expectations (SD29 §8 / Appendix 5 themes).

Core modules

Module 05 — Scenario-Based and Tailored Training

Module 05 — Designing Scenario-Based & Tailored Training

Duration: ~2.5 hours
Competency focus: Problem Solving & Decision Making · TEM · Workload Management · Application of Procedures/Knowledge

Learning objectives

1. Design a **Scenario-based training phase** session with clear objectives, competency targets, and deliberate threats (Doc 9995 Part I, **7.6** paraphrased).
2. Build branching / tailoring options from **Evaluation phase** evidence without leaving the approved syllabus.
3. Control scenario pace and complexity so evidence remains observable; know when the TRI may intervene to enable development (contrast with Evaluation).
4. Avoid common design faults (overload, ambiguity, “gotcha” training).
5. Keep the principle: **competencies = aim**; **scenario = vehicle**; train to competency.

1. What a good training scenario is

A scenario is a **coherent operational story** (typically line-oriented) that forces pilots to manage the aeroplane, the environment, and the crew — generating evidence across multiple competencies and developing **TEM** capability. It is not a random fault dump.

In Doc 9995 terms (Part I, 7.6, paraphrased): the Scenario-based training phase develops, retains, and practises competencies for managing threats and errors. **Unlike the Evaluation phase**, the instructor should intervene or interrupt where necessary to enable development or enhance learning. Adapt content toward weaker competencies identified in Evaluation.

Quality checks:

- Linked to stated objectives and competencies.
- Threats are realistic for the type and operation.
- Success is possible with good TEM and CRM — not only with insider knowledge.
- The TRI can increase or decrease pressure deliberately.
- Debrief hooks are planned in advance.

2. Scenario design template

Element	Prompt
Phase	Scenario-based training phase (or Evaluation phase if used as baseline)
Crew context	Experience, seat, recent training themes
Operational setup	Route, airport, weather, fuel, time of day, cabin/ATC factors
Primary competencies	Choose 2–4
Primary threats	Weather, technical, organisational, human, environmental
Trigger events	What you will insert, and when (or under what condition)
Must-achieve items	Any manoeuvre / procedural items embedded
Observable success	What you expect to see if competencies are effective
Tailor-up	If crew coping well — add complexity (examples)
Tailor-down	If overloaded — simplify, freeze, or re-brief objective
Safety / device	Freeze policy, catastrophic risks, instructor station plan
Debrief themes	Pre-planned 2–3 themes

3. Threat generation (deliberate, not malicious)

Threats should **train management**, not humiliate.

Examples of useful threat classes (customise to type):

- Environmental — windshear potential, contaminated runway, significant weather on diversion.
- Technical — degradation that forces automation/manual decisions and procedure application.
- Operational — late runway change, holding, commercial pressure scripts (used carefully).
- Human / crew — startle, conflicting information, high communication load.

Rules of thumb:

- One major technical event plus environmental pressure often beats three simultaneous rare failures.
- Allow time for procedures to be applied; interrupting every checklist teaches nothing.
- Align threats with the competency you claim to be training.

4. Tailoring in the moment

Evidence from session	Tailoring action
Strong path control, weak decisions	Reduce handling difficulty; increase optionality / ambiguity in plan
Overload, crumbling basics	Remove secondary threats; return to Manoeuvres-style rebuild; then re-enter lighter scenario
Excellent TEM on first event	Introduce a second-order threat or time constraint
One pilot dominating	Adjust role tasks; debrief Leadership & Teamwork explicitly; consider seat focus

Document the tailoring decision briefly in notes — it is part of EBT discipline.

5. Embedding manoeuvres inside scenarios

Keep phase clarity. The **Manoeuvres training phase** is deliberately **not** line-oriented scenario training (Part I, 7.5). Regulatory / company manoeuvres can still sit inside a later scenario **if** the TRI obtains clean evidence and the trainee understands when a “manoeuvre spotlight” is occurring. Alternatives:

- Complete **Manoeuvres training phase** block, then enter **Scenario-based training** that reinvests the skill.
- **Evaluation phase** first, then focused manoeuvre repair, then short Scenario-based re-test tailored to Evaluation gaps.

State the plan in the brief so trainees are not guessing the rules of the game — and so the TRI matches intervention policy to the declared phase.

6. Design faults to avoid

- **Gotcha** — hidden trick that only the TRI can win.
- **Firehose** — continuous faults preventing any competent process.
- **Objective drift** — interesting story, forgotten training aim.
- **Unobservable** — so much happening that notes and debrief become guesswork.
- **Type-unrealistic** — threats that undermine credibility.
- **No exit** — scenario cannot be terminated cleanly for teaching reset.

7. Workshop

Each candidate designs a 45-minute scenario for their type using the template; peer review against quality checks; one scenario selected for sim practice days.

Delivery assets: use Worksheet — Scenario Cards as reusable type-agnostic starters; run the timed classroom workshop with Lesson Plan LP-08.

8. Key takeaways

- Design on a template; plan threats and debrief hooks; competencies are the aim.
- Tailor Scenario-based content from Evaluation evidence; stay inside approved objectives.
- In Scenario-based training the TRI **may intervene to develop**; in Evaluation, normally not.

- Manoeuvres training and Scenario-based training can sequence in one detail if phase clarity is maintained.

Instructor notes

- Provide example skeleton for the house type (777 or client type) without copying Operator manuals.
- Link to Module 07 for facilitation during threat insertion.
- Classroom delivery: LP-08; cards: Worksheet — Scenario Cards; IOS planning hand-off: Module 08 mini-checklist.
- Operator scenario libraries / Part II-style generation tables remain ATO/Operator programme design (Alignment — ICAO Doc 9995).

Core modules

Module 06 — Assessment and AoC Judgement

Module 06 — Assessment, AoC-Style Judgement & Note-Taking

Duration: ~2.0 hours
Competency focus: Application of Procedures/Knowledge · Situation Awareness · Professional Standards · Communication

Learning objectives

1. Separate **training** behaviours from **assessment** behaviours and know when each applies (especially Evaluation phase vs later phases).
2. Apply AoC-style judgement principles: evidence, standard, fairness, and clear outcome — consistent with Doc 9995 Part I, **6.3.3** instructor competences and **7.7** assessment logic (paraphrased).
3. Produce notes that would withstand standardisation review (objective behavioural evidence).
4. Recommend further training using competency language; seek **root causes**, highlight strengths, and flag eroding safety margins.
5. Explain that formal instructor competency assessment before EBT instruction (**6.3.4**) and refresher/re-assessment (**6.3.5**) are ATO/Operator responsibilities beyond MaxFli course completion.

1. Training vs assessment — role clarity

	Training emphasis	Assessment emphasis
Aim	Develop competence	Determine if standard met
Coaching	Often appropriate (phase-dependent)	Limited / defined by rules of the test
Outcome	Progress + plan	Pass / fail / partial with conditions as applicable
TRI mindset	Facilitator & coach	Fair judge using approved criteria

TRI courses develop instructors who can do both. Mixing them without telling the trainee is unfair. **Announce the rules** at the brief.

Assessment of Competence for instructor privileges follows Authority / ATO procedures — this module builds **judgement skill** using that style; it does not replace the official AoC syllabus.

2. Principles of sound instructional assessment

1. **Evidence-based** — decisions rest on observed behaviours, not reputation.
2. **Standard-referenced** — compare to published SOP / competency expectations, not to the strongest trainee of the week.
3. **Sufficient sample** — critical safety failures may decide early; otherwise look for patterns.
4. **Transparent** — trainee understands basis of the result.
5. **Consistent** — calibrate with other instructors.

6. **Documented** — notes support the result and any tailored training.

3. Linking to Doc 9995 instructor competences (Part I, 6.3.3 — paraphrased)

When judging pilots — or when being judged as a TRI candidate — practise:

Competence focus	In assessment notes / debrief
Observe behaviours / objective evidence	Facts + competency tags a third TRI could recognise
Correlate with potential outcome	“If repeated on the line, this would likely…”
Highlight good performance	Strengths recorded, not only deficiencies
Root causes	Why the standard was missed (competency/TEM), not only what failed
Safety margins	Explicit call-out when margins were eroding

Evaluation phase reminder (Part I, 7.4 / 7.7): the purpose includes assessing competence, informing training-system effectiveness, and indicating individual training needs. Areas below minimum standard become the focus of subsequent training. Operator policies on line-flying status after unresolved gaps remain with the Operator — not this pack.

Instructor gate (6.3.4 / 6.3.5): before conducting instruction and assessment in an EBT programme, instructors should successfully complete a formal competency assessment in a practical session supervised by a nominated person; thereafter annual refresher and periodic re-assessment apply. MaxFli course completion supports readiness; it does not replace those organisational steps.

4. Making the judgement call

Useful internal questions

- What exactly did I see (or not see)?
- Which competencies / TEM issues does this relate to?
- Is this a one-off slip manageable on the line, or a gap that makes operation unsafe / below standard?
- Would another TRI, given my notes, likely reach the same conclusion?
- What further training would specifically address the gap?

Outcomes the TRI commonly influences

- Continue as planned.
- Additional training then progress.
- Stop training pending review (safety / attitude / preparation concerns).
- In assessment contexts: meet / not meet standard under the applicable procedure.

MaxFli expectation: When unsure on a borderline case, seek a second opinion from the Training Manager / senior TRI rather than “giving the benefit” without evidence or “failing” without clarity.

5. Note-taking standard

During the session

- Time / phase markers.
- Factual event + brief behaviour.
- Competency / TEM tag.
- Safety interventions marked clearly (what you did and why).

After the session

- Promote raw notes into 2–4 themes.
- Record strengths as well as gaps.
- Write the training recommendation as an action, not a slogan (“more CRM”).
- Better: “Additional scenario focusing on decision-making under time pressure and PM involvement before diversion commit.”

Notes that fail review

- “All OK.”
- “Needs work.”
- Sarcasm or personal remarks.
- Copy-paste identical text for every trainee.

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6. Feeding the training system

Good TRI notes help:

- The next instructor (continuity).
- Recurrent / EBT programme design (topics that keep appearing).
- Risk management (systemic issues vs individual).

Treat records as professional products.

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7. Workshop — borderline cases

In groups, judge three written case studies (**borderline unstable approach continuation**; **excellent handling but closed leadership**; **solid process with one critical checklist error caught by PM**). Full write-ups: Worksheet — Borderline Cases (use with Lesson Plan LP-06). Require:

- Evidence summary
- Competency tags
- Outcome
- Further training plan

Compare plenary; highlight calibration differences.

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8. Key takeaways

- Announce whether you are training or assessing — and which EBT phase rules apply.
- Judge against standards with **sufficient, specific evidence**; include strengths and root causes.
- Notes must explain the result to a third party and support tailored next training.
- Formal EBT instructor assessment / refresher remains ATO/Operator (6.3.4 / 6.3.5).
- Borderline? Escalate — do not gamble quietly.

Instructor notes

- Hand out Worksheet — Borderline Cases for the §7 workshop / Lesson Plan LP-06.
- Use Assessment — Course Completion Checklist to show how TRI *candidates* are themselves assessed on this course.
- Stress legal/organisational sensitivity of records without quoting regulations at length.
- Walk the mapping in Alignment — ICAO Doc 9995 for 6.3.3–6.3.5 and 7.7.
- Walk Alignment — CAA SD29 for CRM/NTS assessment in the operational environment and AoC expectations for teaching TEM/CRM (SD29 §8 / §10).
- Remind candidates: do not adjust assessment criteria solely for a candidate's experience level (SD29 §10.3 paraphrased); use the operator's published standard.

Core modules

Module 07 — TEM and Facilitation

Module 07 — TEM, Threat Generation & Facilitation vs Instruction

Duration: ~2.0 hours
Competency focus: TEM theme · Situation Awareness · Leadership & Teamwork · Workload Management

Learning objectives

1. Use Threat and Error Management as a continuous instructional theme in design, observation, and debrief.
2. Insert and modulate threats to generate learning, not confusion.
3. Choose **facilitation** or **instruction** deliberately and explain the choice.
4. Recognise when facilitation has failed and directive intervention is required.
5. Demonstrate ability to **integrate, teach, and assess TEM and CRM in the operational (FSTD) environment** — consistent with UK CAA SD29 v9.1 §4.5 / §8 (paraphrased) and AMC1 FCL.920 expectations as applied by the ATO/Operator.
6. Distinguish “mentioning CRM in the debrief” from **training CRM** during the session.

1. TEM for instructors (working model)

TEM examines how crews manage **threats** (external factors), **errors** (crew actions/inactions that deviate), and **undesired aircraft / mission states** — and how they recover or trap issues before consequence.

For the TRI:

- Design scenarios that present manageable threats.
- Observe whether crews **anticipate, trap, and mitigate**.
- Debrief the management story, not only the fault message.
- Avoid treating TEM as a poster on the wall — name it in notes and debriefs.

1a. UK CAA SD29 v9.1 — Part FCL instructors and CRM/TEM (paraphrased)

Cite **Standards Document 29 Version 9.1** by section; do not quote CAA text.

Operational environment (SD29 §4.2): simulator training including the briefing and debriefing, or line training. That is where this TRI course expects you to teach CRM/TEM.

Part FCL instructors (SD29 §8, paraphrased):

- A TRI/SFI delivering CRM only in the operational environment is **not** automatically required to complete the full classroom **Flight Crew CRMT** pathway (§6).
- Practical instructor training must still develop the skills to **teach and assess TEM and CRM** (linked to AMC1 FCL.920).
- Knowledge and ability to teach CRM at a level suited to the operational environment may be checked at **initial and recurrent Assessments of Competence**.

- Simply making occasional TEM/CRM “links” while teaching technical items is **not the same** as being able to teach CRM subjects properly in that environment.
- Operators/ATOs must ensure instructor courses go deep enough for their organisation; they may draw on experienced CRMTs for guidance.

FSTD practice (SD29 §4.5, paraphrased): discussing CRM topics only during LOFT-style debriefs is common — but instructors must still show they can **integrate, train, and where applicable assess/evaluate** CRM in the device.

Assessment (SD29 §10, paraphrased): CRM/NTS assessment uses observable behaviours (NOTECHS is one recognised marker system). Under EBT/ATQP, technical and non-technical performance are considered together in the Evaluation phase (or equivalent). Keep standards consistent; do not rewrite criteria merely because a candidate is experienced or inexperienced. Full OPC/Line Check methodology remains in the OM / Standards Doc 24A.

Honest gap: dedicated **classroom CRMT** appointment, refresher, and examiner processes (§6–§7) are Operator responsibilities — not completed by this TRI pack. See Alignment — CAA SD29.

2. Observing TEM in practice

What you might see	Instructional interpretation
Crew brief contingency fuel / weather	Threat anticipation
PM catches mode error	Error trapping
Continued unstable approach without plan	Undesired state not managed
Good recovery after startle	Resilience — still explore prevention

Tag TEM alongside competencies (often Situation Awareness, Workload Management, Problem Solving & Decision Making, Communication).

3. Threat generation craft

Prepare: Know the trigger, the expected competent response, and your tailor-up/down.
Insert: Clear, realistic, timed to allow process.
Monitor: If the threat simply destroys the session objective, modulate.
Hold: Resist narrating the answer from the IOS unless phase = Manoeuvres instruction.
Recover: Be ready to freeze, clarify, and restart a segment for learning value.

Ethical line: Threats train professionals. They are not tools for dominance or entertainment.

4. Facilitation vs instruction

Facilitation	Instruction
Questions, prompts, silence	Clear direction, demonstration, “do it like this”
Trainee constructs understanding	TRI transmits model
Best when safety margins OK and time allows	Best when safety, novelty, or time demands clarity
Builds transfer and ownership	Builds accurate schema quickly

Choose facilitation when

- Evaluation phase or Scenario-based training phase and aircraft path is safe.
- Trainee has enough knowledge to discover with guidance.
- You want decision-making / TEM / CRM evidence and self-analysis (SD29 facilitation emphasis).

Choose instruction when

- Safety or device integrity at risk.
- Trainee is lost and frustration blocks learning.
- New critical procedure must be modelled correctly the first time.
- Manoeuvres training phase requires a clean technique model.

Hybrid (common)

Prompt once → if no progress, tighten the prompt → then instruct the model → then let them practise → facilitate the debrief.

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5. Intervention ladder (in-session)

1. **Observe** — note only.
2. **Subtle prompt** — “What’s your plan for…?”
3. **Focused challenge** — “Confirm FMA.”
4. **Directive instruction** — clear corrective input.
5. **Takeover / freeze** — safety or reset learning.

Announce in the brief roughly where you will sit on this ladder for each phase.

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6. Workshop

Role-play IOS insertions: weather threat, automation surprise, cabin pressure. Observers score: realism, timing, facilitation discipline, and safety control.

Timed practice: a short intervention-ladder language clinic sits inside Lesson Plan LP-03 (TEM/intervention block) so ladder steps are drilled before sim days. Seat/takeover mechanics and IOS mini-checklist: Module 08. Scenario cards for insertion ideas: Worksheet — Scenario Cards.

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7. Integrating CRM with technical training (operational environment)

Practical MaxFli standard for TRI candidates (aligned with SD29 Appendix 5 FSTD themes — paraphrased practice, not a copy of the form):

1. Support stated CRM/TEM objectives, not only technical ticks.
2. Role-model CRM (open climate, standards, assertiveness norms).
3. Weave CRM into the technical story **in the box**.
4. Identify behaviours for **errors and good results**.
5. Use company competency / NOTECHS-style language when provided.
6. Facilitate self-analysis before delivering the model.

7. Judge non-technical performance with the same care as handling.
8. Show CRM subject knowledge appropriate to sim/line instruction.

8. Key takeaways

- TEM is a lens for design, notes, and debrief — and a **taught** skill, not a slogan.
- Generate threats with a learning purpose and an exit strategy.
- Facilitation is default for development; instruction is a precision tool.
- Climb the intervention ladder early enough for safety, late enough for learning.
- SD29 §8: Part FCL instructors must be able to teach/assess TEM & CRM in the operational environment; classroom CRMT is a separate Operator pathway.

Instructor notes

- Cross-link Module 05 (design) and Module 08 (seat intervention mechanics).
- Do not re-teach TEM theory in Module 08 or LP-03 — point here; use those for practice/mechanics only.
- Discourage mockery of trainee startle — startle is a training resource.
- Use Alignment — CAA SD29 when clients ask about CAA HF/CRM instructor expectations.

Core modules

Module 08 — Practical TRI Skills

Module 08 — Practical TRI Skills: Seat Craft, Intervention & FFS Techniques

Duration: ~3.0 hours classroom concepts + embedded FFS practice
Competency focus: Flight Path instructional control (Manual & Automation) · Workload Management · Communication · Leadership & Teamwork · Professional Standards

Learning objectives

1. Manage TRI seating, role clarity, and seat swaps without breaking training continuity.
2. Intervene proportionately — verbal, guidance, control input, or freeze.
3. Use FFS tools (freeze, reposition, weather, failures, IOS) to serve objectives.
4. Maintain instructional situation awareness: trainee learning state + aircraft/device state.

1. Seat craft and role clarity

Before engines start (or at detail start):

- Who is PF/PM for each segment.
- Where the TRI sits (jump seat / observer / occupying a pilot seat for demonstration).
- When a seat swap will occur and how control is transferred.
- What the non-flying trainee does during demonstrations.

Transfer of control (training): Standard verbalisation; confirmed hands/eyes; no ambiguity. Treat it with line-level seriousness — habits transfer.

Example takeover / transfer of control phraseology (type-agnostic)

Use the ATO / Operator approved set where one exists. The examples below are **MaxFli training defaults** for clarity and professionalism — British English, type-agnostic. Agree the exact words with the ATO before Day 4 FFS practice (Lesson Plan LP-04 / Lesson Plan LP-05).

Situation	Spoken example (TRI ↔ trainee)
TRI taking control	**TRI:** "I have control." **Trainee:** "You have control." *(Hands clear; eyes confirm.)*
Returning control	**TRI:** "You have control." **Trainee:** "I have control."
Guidance without taking control	**TRI:** "Keep control — confirm FMA / energy / plan." *(Stay off the controls.)*
Freeze for teaching / safety	**TRI:** "Freeze." *(Then brief the teaching point; do not coach mid-critical flight path unless safety demands.)*
Unfreeze / continue	**TRI:** "Continue — you have control." **Trainee:** "I have control."
Seat swap (planned)	Brief before engines: "After this reposition we swap seats; control transfer on my call." At the moment: complete transfer phraseology **before** belts/seats move.

Habits: No simultaneous hands on controls without a clear “I have / you have.” No silent grabs. Record any unplanned takeover for debrief (what, why, effect on evidence — especially in Evaluation phase).

2. When the TRI occupies a pilot seat

Legitimate reasons include demonstration, safety backup early in training, or specific ATO practice. Risks:

- Trainee becomes passenger.
- Role confusion for PM duties.
- TRI “flying the detail” to look tidy for the schedule.

Mitigation: Time-box demonstrations; return control; debrief why you took the seat; prefer facilitation from the observer seat when competence allows.

3. Intervention techniques

Intervention **mechanics** live here. The **ladder, facilitation vs instruction choice, and TEM craft** live in Module 07 — use that module for theory; practise the feel of the ladder in FFS (Lesson Plan LP-04, Lesson Plan LP-05) and the short clinic in Lesson Plan LP-03.

Verbal

- Priority callouts aligned with company practice where possible.
- Short and actionable: “Speed.” “Go around.” “Confirm thrust.”
- Avoid commentary essays mid-manoeuvre.

Guidance without taking control

- Direct attention: “FMA.” “Energy.”
- Suggest process: “Run the memory items.”

Control intervention

- Take control clearly when safety margins require it.
- Stabilise, explain briefly, return control when appropriate, and note for debrief.

Freeze / pause

- Use to prevent negative training, to reset, or to teach a fast-moving item.
- Overuse destroys scenario fidelity — especially in Scenario phase.

4. Worked intervention vignettes (by EBT phase)

Short, realistic contrasts. **Proportionate** intervention protects learning; **over-intervention** steals evidence or turns Scenario into lecture.

Vignette A — Evaluation phase

Setup: Line-oriented Evaluation segment. Crew continues an approach that is becoming unstable (energy high, late config). Path still recoverable; no immediate device risk.

	Proportionate TRI	Over-intervention
Action	Observe; rich notes (facts + competency/TEM tags); intervene **only** if safety/device integrity requires (e.g. clear "Go around" / freeze if margins collapse).	Coaches configuration, narrates the unstable call, or freezes early to "teach the approach."
Effect on evidence	Baseline remains valid; Evaluation can inform tailored Manoeuvres / Scenario.	Evidence contaminated; cannot claim a clean Evaluation picture.
Debrief hook	"What cues did you have? What was your go-around trigger?" — then state the standard.	Trainee remembers the TRI's voice, not their own decision process.

Link: Evaluation behaviour in Module 03 / Lesson Plan LP-04; facilitation questions in Module 07 — do not coach here unless safety forces it.

Vignette B — Manoeuvres training phase

Setup: Rejected take-off or go-around technique practice. Trainee's first attempt is untidy (sequence incomplete; path control loose).

	Proportionate TRI	Over-intervention
Action	Active trainer: short model or freeze → clear sequence → trainee practises; reposition for clean loops; time-box demo if TRI takes a seat.	Flies every attempt "to show how it's done"; or freezes every 5 seconds with essays.
Effect on learning	Trainee builds a correct schema and gets deliberate practice.	Trainee becomes passenger; confidence and muscle memory do not transfer.
Debrief hook	What improved between attempt 1 and 3? Which competency (Manual path / Workload / Procedures)?	"Watch me again" with no ownership.

Link: Manoeuvres active-trainer role — Module 03 / Lesson Plan LP-04. Seat discipline — §1–2 above.

Vignette C — Scenario-based training phase

Setup: Diversion / system degradation story. Crew is slow to form a plan; path is safe; time pressure rising. Weak Decision Making / Communication noted from prior Evaluation.

	Proportionate TRI	Over-intervention
Action	Climb the Module 07 ladder: observe → "What's your plan for fuel / destination?" → focused challenge if needed → freeze/instruct only if stuck or margins erode; may interrupt **to enable development** (contrast with Evaluation).	Immediately dictates the diversion plan from the IOS, or inserts three extra faults while they are still forming the first plan (firehose).
Effect on learning	Crew practises TEM and CRM in the box; TRI can tailor-up/down.	Scenario becomes TRI theatre; CRM/TEM not trained — only mentioned later.
Debrief hook	TEM narrative: threats anticipated, trapped, mitigated; strengths + root cause.	"You should have done X" monologue.

Link: Scenario design Module 05; TEM/facilitation Module 07; FFS practice Lesson Plan LP-05.

5. FFS / IOS techniques that serve learning

Tool	Good use	Poor use
Freeze	Teach, reset, safety	Constant stop-start with no objective
Reposition	Efficient manoeuvre practice	Skipping needed briefing context every time
Weather / visibility	TEM and minima decisions	Random punishment
Failures	Procedure + CRM evidence	Rare triple failures without process time
Replay / plots	Evidence in debrief	Weaponising data to win arguments
Seat vibration / motion	Realism within comfort	Nausea as a “lesson”

Plan the IOS as carefully as the route. Know where failures live and how to remove them.

IOS planning mini-checklist (TRI preparing a session)

Complete before the brief (pair with the Module 05 design template and the Lesson Plan LP-04 / Lesson Plan LP-05 device notes):

#	Check	Done
1	Phase declared (Evaluation / Manoeuvres / Scenario) and **intervention policy** matched	☐
2	Primary competencies (2–4) and must-achieve items listed	☐
3	Weather / airport / fuel / time-of-day set; minima implications understood	☐
4	Trigger events listed with **when** (or condition) and expected competent response	☐
5	Failure / malfunction codes known; **remove / reset** path rehearsed	☐
6	Freeze policy agreed (rare in Evaluation; teaching OK in Manoeuvres; Scenario = preserve flow)	☐
7	Reposition points planned for Manoeuvres loops (not for skipping brief context)	☐
8	Tailor-up and tailor-down options written (one line each)	☐
9	External roles (ATC / cabin / company) — who plays them; script cues ready	☐
10	Seat plan / control-transfer moments briefed; takeover phraseology confirmed with ATO	☐
11	Debrief evidence hooks (2–3 themes) planned; replay/plot intent noted if used	☐
12	Time budget vs must-do items; what drops first if running late (honest record)	☐

TEM threat-generation craft (ethical line, modulate, hold): **Module 07** — do not duplicate here.

6. Instructional situation awareness

Hold three pictures:

1. **Aircraft / device** — path, modes, malfunctions, position.
2. **Crew learning state** — overload, confusion, false confidence, conflict.
3. **Session plan** — phase, objectives, time, remaining must-do items.

When pictures conflict, **safety first**, then learning integrity, then schedule.

7. Common practical errors (and fixes)

Error	Fix
Talking over sterile / critical phases unnecessarily	Discipline commentary; use freeze for teaching points
Saving all feedback for later when a quick correction would prevent negative training	Short corrective loop, then continue
Ignoring the PM	Explicit PM objectives; include in debrief equally
Running out of time, rushing last items	Prioritise; record incomplete items honestly; tailor next detail
Demonstrating at airline-captain pace the trainee cannot follow	Demonstrate at instructional pace; narrate key cues

8. Integration with EBT phases

- **Evaluation:** Minimise coaching; intervene for safety; notes rich.
- **Manoeuvres:** Demonstrations, reposition efficiency, clear model.
- **Scenario:** Preserve flow; threats via IOS; facilitation preference; freeze only when needed.

Phase coaching intensity is taught in Module 03; facilitation vs instruction and the intervention ladder in Module 07; seat/IOS execution here and in Lesson Plan LP-04 / Lesson Plan LP-05.

9. Sim practice goals (TRI candidate)

Across observed instructional seats, the candidate should demonstrate:

- Clear brief with phase and competencies.
- Controlled IOS use aligned to plan.
- Proportionate intervention.
- Balanced attention to both trainees.
- Debrief with evidence, TEM, and tailored outcome.
- Professional seat/control discipline.

10. Tutor “success look-like” rubric — practical TRI skills

Aligned to Assessment — Course Completion Checklist **Section E** (Practical FFS instructional skills). Use during observed seats (Lesson Plan LP-04, Lesson Plan LP-05) and final sign-off. Mark **Met / Developing / Not yet**.

Checklist	Success look-like (Met)	Developing	Not yet
E1 Seat craft / control transfer	Clear PF/PM and seat plan; transfer phraseology used; no ambiguous hands; planned swaps do not break continuity	Occasional unclear transfer; recovers	Silent grabs, role confusion, or TRI “owns” the detail without brief

Checklist	Success look-like (Met)	Developing	Not yet
E2 Proportionate intervention ladder; safety first	Matches Module 07 ladder to phase; safety interventions crisp and recorded; learning protected when margins OK	Right instinct, sometimes early/late	Impatient takeover or frozen inaction when margins erode
E3 IOS / freeze / reposition serve objectives	Tools follow the plan and mini-checklist; freeze rare in Evaluation; Manoeuvres loops efficient; Scenario flow preserved	Occasional tool without clear aim	Firehose faults, freeze theatre, or unplanned IOS chaos
E4 Instructional SA (aircraft + learner + plan)	Holds all three pictures; adjusts when they conflict (safety → learning → schedule)	Sees aircraft well; misses learner overload or plan drift	Fixates on one picture; schedule drives unsafe or empty training
E5 Coaching intensity matches declared EBT phase	Evaluation = observe; Manoeuvres = active trainer; Scenario = may intervene to develop — announced and lived	Announces phase; slips into coaching in Evaluation	Same behaviour in every phase; trainees guessing the rules
E6 Facilitate self-analysis; role-model CRM; fair NTS + technical	In-box CRM/TEM integration (not only debrief slogans); balanced crew attention; strengths + gaps; fair NTS with technical	Good intent; still TRI-monologue heavy	CRM only named afterwards; personality labels; one pilot ignored

Tutor note: Section E is MaxFli course evidence — it does not replace the Authority / ATO TRI AoC. Cross-check TEM/facilitation depth in Module 07 and checklist **C4** / **E6**.

11. Key takeaways

- Seat and control discipline are part of Professional Standards.
- Intervention is a ladder — climb it for safety, not for impatience (theory: Module 07).
- IOS tools are for objectives, not theatre — plan them with the mini-checklist.
- Hold aircraft, learner, and plan SA together.
- Phase-appropriate intervention is itself a competency of the TRI.

Instructor notes

- Pair with lesson plans Lesson Plan LP-04 and Lesson Plan LP-05 for FFS sessions; use §4 vignettes and §10 rubric while observing.
- Standardise takeover phraseology with the ATO before Day 4.
- Keep Module 07 as the home for TEM, facilitation vs instruction, and the intervention ladder — point there; do not re-teach the theory in this module.
- Short classroom practice of ladder language: Lesson Plan LP-03 TEM/intervention block.
- Day-2 design workshops (LP-07, LP-08) feed better IOS plans into sim days.

Regulatory alignment

Alignment — ICAO Doc 9995

ICAO Doc 9995 Alignment — MaxFli TRI Course

Reference: ICAO Doc 9995, *Manual of Evidence-based Training*, First Edition, 2013 (cited by Part / section only).
Brand: MaxFli Aviation · British English
Purpose of this page: Show a reviewer where this TRI development pack maps to Doc 9995 instructor and conduct guidance — and what remains an ATO / Operator responsibility.

How to use: Teach from content modules **01–08**. Use this page (09) for auditor / compliance mapping only — it is not a teaching syllabus.

Scope note (read first)

Doc 9995 primarily addresses **recurrent** pilot assessment and training under an Evidence-based Training programme (linked to Annex 6 operator responsibilities). It sets out how EBT sessions are conducted and what instructors need to be able to do.

This MaxFli TRI course prepares instructors to deliver **competency-based / EBT-aligned** type and recurrent training consistent with Doc 9995 instructor-competence and session-conduct guidance (especially Part I, 6.3 and Chapter 7).

It is not, by itself:

- an approved operator **baseline** or **enhanced** EBT programme;
- a substitute for the ATO's approved TRI course lodged with the Authority;
- a complete implementation of Doc 9995 Part II appendices (malfunction clustering, generation tables, operator data programmes, etc.).

Operators and ATOs remain responsible for programme approval, data-driven topic selection, grading systems, instructor nomination and formal competency assessment before EBT instruction, and annual refresher / periodic reassessment arrangements.

All wording below is **paraphrased** MaxFli instructional design. Do not treat it as a quotation of Doc 9995.

Mapping matrix

Doc 9995 reference (paraphrased intent)	Where covered in this course	Residual gap / ATO · Operator responsibility
Part I, 6.3.1–6.3.2 — Instructors need knowledge of the competency framework and suitable training so they can assess, guide improvement, and recommend further training within an EBT programme	Modules Module 02 — Pilot Competencies for Instructors, Module 03 — EBT Philosophy and Design, Module 06 — Assessment and AoC Judgement; LP-02; observation worksheets; course overview learning outcomes	Operator/ATO grading scale and competency dictionary as approved locally; formal EBT instructor conversion if required by the State
Part I, 6.3.3 (a) — Know core competencies and measure observed behaviours against the defined grading system	Module Module 02 — Pilot Competencies for Instructors; worksheets; LP-02	Adopt the **operator/ATO grading system** (this pack uses instructional adaptations, not a proprietary grade scale)
Part I, 6.3.3 (b) — Assess by observing behaviours and gathering **objective evidence** against behavioural indicators	Modules Module 02 — Pilot Competencies for Instructors, Module 06 — Assessment and AoC Judgement; observation sheet; competency notes template; LP-02, LP-06	Link notes to the organisation's official indicators / forms
Part I, 6.3.3 (c) — Correlate observed behaviour with **potential outcome** in training situations	Modules Module 02 — Pilot Competencies for Instructors, Module 06 — Assessment and AoC Judgement, Module 07 — TEM and Facilitation; LP-04 / LP-05 debriefs	Include in local standardisation and AoC for instructors
Part I, 6.3.3 (d) — Recognise and **highlight good performance**	Modules Module 04 — Briefing and Debriefing, Module 06 — Assessment and AoC Judgement; debrief clinic LP-03; worksheets (strengths columns)	Reinforce in annual instructor refresher
Part I, 6.3.3 (e) — Determine **root causes** for below-standard performance (not symptoms alone)	Modules Module 02 — Pilot Competencies for Instructors, Module 03 — EBT Philosophy and Design (Evaluation), Module 04 — Briefing and Debriefing, Module 06 — Assessment and AoC Judgement; LP-04 interim / debrief	Operator training-needs process and remediation policy
Part I, 6.3.3 (f) — Identify situations that could **reduce safety margins** unacceptably	Module Module 08 — Practical TRI Skills; intervention ladder; LP-04 / LP-05	Device safety policy; FSTD instructor station SOPs
Part I, 6.3.4 — Formal **competency assessment** before instructing/assessing in an EBT programme, in a practical session supervised by a nominated person	Course completion checklist (MaxFli gate); Module Module 06 — Assessment and AoC Judgement AoC-style judgement practice	**ATO/Operator must** run the formal supervised assessment and nominate the assessor — MaxFli checklist is preparatory evidence only
Part I, 6.3.5 — **Annual refresher** training; re-assessment of 6.3.3 competences on a periodic cycle (Doc 9995: every three years)	Mentioned in overview + this alignment page; modular refresh option in duration guidance	Schedule and record refresher / reassessment in OM-D; not completed by this initial TRI pack alone

Doc 9995 reference (paraphrased intent)	Where covered in this course	Residual gap / ATO · Operator responsibility
Part I, 7.3 — Briefing covers **objectives** (minimum competency standard; handling skills; TEM capability) and **session structure**: Evaluation → Manoeuvres training → Scenario-based training	Modules Module 03 — EBT Philosophy and Design, Module 04 — Briefing and Debriefing; LP-03, LP-04, LP-05	Align brief templates with operator EBT module paperwork
Part I, 7.4 — Evaluation phase — Observe/assess; collect system data; identify individual training needs; instructor normally does **not** instruct/interrupt; line-oriented scenario; prefer **root cause** over symptoms	Modules Module 03 — EBT Philosophy and Design, Module 04 — Briefing and Debriefing, Module 06 — Assessment and AoC Judgement; LP-04 Evaluation segment; observation worksheets	Operator evaluation scenarios and data-capture tools; CAA may allow different sequence in some AQP-like cases (local approval)
Part I, 7.5 — Manoeuvres training phase — Practise critical flight manoeuvres / handling to defined criteria; **active trainer**; **not** line-oriented scenario training	Modules Module 03 — EBT Philosophy and Design, Module 08 — Practical TRI Skills; LP-04 Manoeuvres segment	Manoeuvre list, frequency, and performance criteria from Operator/ATO / Part II-type appendices as approved
Part I, 7.6 — Scenario-based training phase — Develop TEM capability; instructor **may intervene** to enable development (contrast with Evaluation); adapt content to weaker competencies from Evaluation	Modules Module 03 — EBT Philosophy and Design, Module 05 — Scenario-Based and Tailored Training, Module 07 — TEM and Facilitation; LP-05	Scenario libraries, malfunction clustering, and generation guidance remain Operator/ATO programme design
Part I, 7.7 — Assessment — Evaluation informs subsequent training focus; unresolved gaps have line-flying / privilege consequences under the operator programme	Modules Module 03 — EBT Philosophy and Design, Module 06 — Assessment and AoC Judgement; tailored-training rules; checklist D/E items	Operator policy for removal from line flying / additional training — outside this TRI pack
Part I, 7.8 — Debriefing — Fair review on observed facts; announce outcome early; facilitated self-critique; feedback and recommendations; facilitation technique	Module Module 04 — Briefing and Debriefing; LP-03; LP-04 / LP-05 debrief blocks	Local rules on recording media / playback retention if used
Programme design philosophy — Competencies as the **aim**; scenarios as a **vehicle**; facilitation; tailored training; training to competency	README design principles; Modules Module 03 — EBT Philosophy and Design, Module 05 — Scenario-Based and Tailored Training, Module 07 — TEM and Facilitation; throughout LPs	Full baseline/enhanced EBT approval and data programme

Terminology used in this pack (Doc 9995-aligned)

Preferred term in MaxFli materials	Meaning for instructors
Evaluation phase	Line-oriented observation/assessment; normally no coaching; gather evidence and training needs
Manoeuvres training phase	Focused handling / critical manoeuvre practice; active instruction; not a line-oriented story
Scenario-based training phase	Line-oriented scenarios to build TEM and integrated competencies; instructor may intervene to develop learning
Tailored training	Adjust emphasis and scenario content from Evaluation evidence, within approved objectives
Facilitation	Guided discovery and trainee ownership, especially in debrief and scenario development

Instructor competences (6.3.3) — quick checklist for tutors

During this course, TRI candidates should be observed practising:

1. Using the competency set and behavioural evidence (not vague labels).
2. Collecting objective notes usable by a third instructor.
3. Linking behaviour → likely operational outcome / risk.
4. Naming strengths, not only gaps.
5. Digging for root cause behind a failed item or unstable outcome.
6. Spotting eroding safety margins and intervening proportionately.

Formal sign-off against an EBT instructor standard remains with the **nominated ATO/Operator assessor** (Doc 9995 Part I, 6.3.4).

Related files

- Alignment — CAA SD29 — UK CAA SD29 v9.1 HF/CRM / Part FCL instructor companion mapping
- Course Overview — aims, regulatory framing, scope note
- Module 03 — EBT Philosophy and Design — three-phase model
- Module 04 — Briefing and Debriefing — 7.3 / 7.8 practice
- Module 02 — Pilot Competencies for Instructors — 6.3.3 observation craft
- Assessment — Course Completion Checklist — MaxFli preparatory gate

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Regulatory alignment

Alignment — CAA SD29

UK CAA Standards Document 29 Alignment — MaxFli TRI Course

Reference: UK CAA Standards Document No. 29, Version 9.1 (September 2025) — *Guidance on the requirements for the training and assessment of Human Factors for Flight Crew under UK Part ORO and UK Part FCL*.
Brand: MaxFli Aviation · British English
Companion: Alignment — ICAO Doc 9995 (ICAO Doc 9995 instructor / EBT conduct mapping)

How to use: Teach from content modules **01–08**. Use this page (10) for auditor / compliance mapping only — it is not a teaching syllabus.

Scope note (read first)

SD29 v9.1 is **Human Factors / CRM training and assessment guidance** for flight crew under UK Part FCL and Part ORO. It covers classroom CRM Trainers (CRMTs), Part FCL instructors teaching CRM/TEM in the **operational environment** (simulator briefing/debriefing and line), assessment of CRM skills (including NOTECHS-style behavioural markers), and links to competency-based / EBT approaches where permitted.

This MaxFli TRI course develops Part-FCL-style instructor competence to **integrate, teach, and assess TEM and CRM in the operational (FSTD) environment**, with facilitation and observable-behaviour assessment — consistent with SD29's Part FCL instructor pathway (especially §8) and assessment themes (§10).

It is not, by itself:

- a full **Flight Crew CRMT** classroom trainer qualification or appointment process (§6);
- an operator's approved CRM programme, Part D processes, or contracted-CRM oversight (§4.6);
- a substitute for Standards Doc 24A OPC/Line Check CRM assessment procedures;
- authority to modify operator NOTECHS / competency dictionaries.

All wording below is **paraphrased** MaxFli instructional design. Cite SD29 v9.1 by section; do not treat this as a quotation of CAA text.

Mapping matrix

SD29 v9.1 reference (paraphrased intent)	Where covered in this course	Residual gap / ATO · Operator responsibility
§3 — Integrated technical and non-technical training; Part FCL MCC/TEM/CRM vs Part ORO CRM mapping	Modules Module 02 — Pilot Competencies for Instructors, Module 07 — TEM and Facilitation; overview regulatory framing	Operator syllabus mapping in OM-D; MCC course elements outside TRI pack
§4.2 / §4.5 — Operational environment = FSTD (incl. brief/debrief) or line; instructors must **integrate, train, and assess/evaluate CRM** — discussing CRM only in a debrief is not enough	Modules Module 04 — Briefing and Debriefing, Module 07 — TEM and Facilitation, Module 08 — Practical TRI Skills; LP-04, LP-05	Operator LOFT/CRM continuity with classroom CRMT syllabus
§4.3 / §4.4 / §4.6 — Classroom CRM; CBT complementary only; contracted CRM under operator responsibility	Mentioned as out-of-scope in this alignment page	Full classroom CRMT pathway and contractor audit = Operator
§5 — Training design from management-system hazards/risks; effectiveness evaluation concepts	Module Module 03 — EBT Philosophy and Design / Module 05 — Scenario-Based and Tailored Training design sheets (high level)	Operator CRM content from SMS outputs; Kirkpatrick-style evaluation programme
§6 CRMT — Classroom CRM Trainer appointment, training, refresher (triennial), assessment, recency	Explicit **gap** — not a CRMT course	Operator Part D CRMT processes; third-party providers
§7 CRMTE — Assessor of CRMTs	Out of scope	Operator nomination / standardisation
§8 Part FCL instructors — TRI/SFI etc. need not complete full classroom CRMT if CRM teaching is only in operational environment; practical instructor training must develop skills to **teach and assess TEM and CRM** (AMC1 FCL.920); may be checked at initial/recurrent **AoC**; TEM/CRM “links” ≠ teaching CRM in isolation; operators must ensure sufficient depth	Core of Modules Module 01 — Role of the TRI, Module 02 — Pilot Competencies for Instructors, Module 04 — Briefing and Debriefing, Module 06 — Assessment and AoC Judgement, Module 07 — TEM and Facilitation, Module 08 — Practical TRI Skills; LP-03–LP-06; completion checklist	Operator defines depth for organisation; AoC TEM/CRM items on official examiner forms; optional CRMT conversion (reduced classroom hours) if teaching classroom CRM
§9 — OCC / LIFUS / Line Check / Command Course CRM integration	High-level awareness in role/overview only	Operator Part D qualification of personnel for each phase
§10.1 — CRM skills assessed in operational environment (OPC / Line Check); methodology in OM	Module Module 06 — Assessment and AoC Judgement; LP-06	Standards Doc 24A detail; OM CRM assessment methodology
§10.2 NOTECHS — Behavioural marker categories (e.g. cooperation, leadership, SA, decision-making) for assessing CRM/NTS	Module Module 02 — Pilot Competencies for Instructors (competency observation craft); worksheets; LP-02 — **instructional practice** using observable behaviours	Adopt **operator’s** official NOTECHS / marker set and grading; do not substitute MaxFli adaptations for OM forms

SD29 v9.1 reference (paraphrased intent)	Where covered in this course	Residual gap / ATO · Operator responsibility
§10.3 CBTA / EBT — Under EBT/ATQP, technical and non-technical assessed in Evaluation (or LOE); robust instructor training for inter-rater reliability; avoid changing criteria solely by candidate experience; competencies as aim, tasks/manoeuvres as vehicles	Modules Module 03 — EBT Philosophy and Design, Module 06 — Assessment and AoC Judgement; Doc 9995 alignment companion; LP-04 Evaluation; LP-06 calibration	Operator EBT/ATQP approval, standardisation programme, Part D instructor validation
Appendix 5 FSTD specimen themes (paraphrased practice checklist) — objectives supported; role-model CRM; integrate CRM with technical training; identify behaviours for errors **and** good results; company CRM standards; facilitation for self-analysis; accurate NTS assessment; subject knowledge; instructional skill	Modules Module 04 — Briefing and Debriefing, Module 07 — TEM and Facilitation; LP-03, LP-05; worksheets strengths columns; assessment checklist CRM/TEM items	Official operator assessor forms for CRMT/FSTD CRM competence
§14 Debriefing (facilitation / review practice)	Module Module 04 — Briefing and Debriefing; LP-03	Local debrief media / recording rules

Part FCL TRI pathway vs classroom CRMT (honest split)

Pathway	This MaxFli TRI pack	Not covered here
Teach/assess TEM & CRM in **sim / line** (operational environment)	**Yes — primary aim** (§8)	—
Formal **Flight Crew CRMT** for dedicated **classroom** CRM	No	Operator §6 appointment, training, assessment, recency
Part FCL instructor → later classroom CRMT	Awareness only (course can be shortened for prior teaching/learning — Operator process)	Reduced-hour CRMT course delivery
OPC / Line Check CRM assessment methodology	Judgement skill + observable notes	Doc 24A / OM procedures
Approved EBT / ATQP programme	Instructor conduct aligned (with Doc 9995 companion)	Operator programme approval

Practice checklist for TRI candidates (SD29-flavoured, paraphrased)

During FSTD instructional seats, tutors should see the TRI candidate:

1. State CRM/TEM objectives alongside technical ones.
2. Role-model CRM (communication climate, standards, teamwork).
3. Integrate CRM/TEM **during** the detail, not only as a debrief add-on.
4. Note observable behaviours for both **strengths and errors**.
5. Use the company competency / marker language when provided.
6. Facilitate self-analysis before lecturing.
7. Assess non-technical performance with the same fairness as technical items.

8. Show enough CRM subject knowledge for the operational-environment role.

Related files

- Alignment — ICAO Doc 9995 — EBT instructor competences (6.3) and three-phase conduct (Ch 7)
- Module 07 — TEM and Facilitation — TEM teaching and facilitation vs instruction
- Module 02 — Pilot Competencies for Instructors — observable behaviour craft
- Module 04 — Briefing and Debriefing — operational-environment brief/debrief
- Assessment — Course Completion Checklist — MaxFli gate including TEM/CRM instructional items

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Regulatory alignment

Alignment — CAA Pilot Competencies

CAA Pilot Competencies

Source: UK CAA suggested pilot competency set (Standards Document 29 Appendix 1 / public CAA appendix), adopted by many UK airlines. Marked *OFFICIAL – Public* for unrestricted distribution.

How TRI candidates should use this page: observe behaviours, gather objective evidence, facilitate improvement, and assess in the operational (FSTD/line) environment — not as a tick-list of manoeuvres.

Application of knowledge

Description: Demonstrates knowledge and understanding of relevant information, operating instructions, aircraft systems and the operating environment.

ID	Observable behaviour
OB 0.1	Demonstrates practical and applicable knowledge of limitations and systems and their interaction
OB 0.2	Demonstrates required knowledge of published operating instructions
OB 0.3	Demonstrates knowledge of the physical environment, the air traffic environment including routings, weather, airports and the operational infrastructure
OB 0.4	Demonstrates appropriate knowledge of applicable legislation
OB 0.5	Knows where to source required information
OB 0.6	Demonstrates a positive interest in acquiring knowledge
OB 0.7	Is able to apply knowledge effectively

Application of procedures and compliance with regulations

Description: Identifies and applies appropriate procedures in accordance with published operating instructions and applicable regulations.

ID	Observable behaviour
OB 1.1	Identifies where to find procedures and regulations
OB 1.2	Applies relevant operating instructions, procedures and techniques in a timely manner
OB 1.3	Follows SOPs unless a higher degree of safety dictates an appropriate deviation
OB 1.4	Operates aeroplane systems and associated equipment correctly
OB 1.5	Monitors aircraft systems status
OB 1.6	Complies with applicable regulations
OB 1.7	Applies relevant procedural knowledge

Communication

Description: Communicates through appropriate means in the operational environment, in both normal and non-normal situations.

ID	Observable behaviour
OB 2.1	Determines that the recipient is ready and able to receive information
OB 2.2	Selects appropriately what, when, how and with whom to communicate
OB 2.3	Conveys messages clearly, accurately and concisely
OB 2.4	Confirms that the recipient demonstrates understanding of important information
OB 2.5	Listens actively and demonstrates understanding when receiving information
OB 2.6	Asks relevant and effective questions
OB 2.7	Uses appropriate escalation in communication to resolve identified deviations
OB 2.8	Uses and interprets non-verbal communication in a manner appropriate to the organisational and social culture
OB 2.9	Adheres to standard radiotelephone phraseology and procedures
OB 2.10	Accurately reads, interprets, constructs and responds to datalink messages in English

Aeroplane flight path management — automation

Description: Controls the flight path through automation.

ID	Observable behaviour
OB 3.1	Uses appropriate flight management, guidance systems and automation, as installed and applicable to the conditions
OB 3.2	Monitors and detects deviations from the intended flight path and takes appropriate action
OB 3.3	Manages the flight path safely to achieve optimum operational performance
OB 3.4	Maintains the intended flight path during flight using automation while managing other tasks and distractions
OB 3.5	Selects appropriate level and mode of automation in a timely manner considering phase of flight and workload
OB 3.6	Effectively monitors automation, including engagement and automatic mode transitions

Aeroplane flight path management — manual control

Description: Controls the flight path through manual control.

ID	Observable behaviour
OB 4.1	Controls the aircraft manually with accuracy and smoothness as appropriate to the situation
OB 4.2	Monitors and detects deviations from the intended flight path and takes appropriate action

ID	Observable behaviour
OB 4.3	Manually controls the aeroplane using the relationship between aeroplane attitude, speed and thrust, and navigation signals or visual information
OB 4.4	Manages the flight path safely to achieve optimum operational performance
OB 4.5	Maintains the intended flight path during manual flight while managing other tasks and distractions
OB 4.6	Uses appropriate flight management and guidance systems, as installed and applicable to the conditions
OB 4.7	Effectively monitors flight guidance systems including engagement and automatic mode transitions

Leadership and teamwork

Description: Influences others to contribute to a shared purpose. Collaborates to accomplish the goals of the team.

ID	Observable behaviour
OB 5.1	Encourages team participation and open communication
OB 5.2	Demonstrates initiative and provides direction when required
OB 5.3	Engages others in planning
OB 5.4	Considers inputs from others
OB 5.5	Gives and receives feedback constructively
OB 5.6	Addresses and resolves conflicts and disagreements in a constructive manner
OB 5.7	Exercises decisive leadership when required
OB 5.8	Accepts responsibility for decisions and actions
OB 5.9	Carries out instructions when directed
OB 5.10	Applies effective intervention strategies to resolve identified deviations
OB 5.11	Manages cultural and language challenges, as applicable

Problem solving and decision making

Description: Identifies precursors, mitigates problems, and makes decisions.

ID	Observable behaviour
OB 6.1	Identifies, assesses and manages threats and errors in a timely manner
OB 6.2	Seeks accurate and adequate information from appropriate sources
OB 6.3	Identifies and verifies what and why things have gone wrong, if appropriate
OB 6.4	Perseveres in working through problems while prioritising safety
OB 6.5	Identifies and considers appropriate options
OB 6.6	Applies appropriate and timely decision-making techniques

ID	Observable behaviour
OB 6.7	Monitors, reviews and adapts decisions as required
OB 6.8	Adapts when faced with situations where no guidance or procedure exists
OB 6.9	Demonstrates resilience when encountering an unexpected event

Situation awareness and management of information

Description: Perceives, comprehends and manages information and anticipates its effect on the operation.

ID	Observable behaviour
OB 7.1	Monitors and assesses the state of the aeroplane and its systems
OB 7.2	Monitors and assesses the aeroplane's energy state, and its anticipated flight path
OB 7.3	Monitors and assesses the general environment as it may affect the operation
OB 7.4	Validates the accuracy of information and checks for gross errors
OB 7.5	Maintains awareness of the people involved in or affected by the operation and their capacity to perform as expected
OB 7.6	Develops effective contingency plans based upon potential risks associated with threats and errors
OB 7.7	Responds to indications of reduced situation awareness

Workload management

Description: Maintain available workload capacity by prioritising and distributing tasks using appropriate resources.

ID	Observable behaviour
OB 8.1	Exercises self-control in all situations
OB 8.2	Plans, prioritises and schedules appropriate tasks effectively
OB 8.3	Manages time efficiently when carrying out tasks
OB 8.4	Offers and gives assistance
OB 8.5	Delegates tasks
OB 8.6	Seeks and accepts assistance, when appropriate
OB 8.7	Monitors, reviews and cross-checks actions conscientiously
OB 8.8	Verifies that tasks are completed to the expected outcome
OB 8.9	Manages and recovers from interruptions, distractions, variations and failures effectively while performing tasks

Professional standards *(optional — adopted by some airlines)*

- Offers and accepts feedback
- Aspires to high operational standards
- Maintains high standards of discipline, conduct and appearance
- Engages with passengers to ensure best customer experience
- Exhibits a conscientious and enthusiastic attitude
- Takes responsibility for duty of care to crew and passengers

Crosswalk — CAA public OBs ↔ MaxFli instructional 8

Teaching Modules **01–08** and the course worksheets use MaxFli's **merged eight** (Application of Procedures / Knowledge combined; Situation Awareness for short). This page presents the CAA public set with Application of knowledge and Application of procedures and compliance with regulations **split**, and Situation awareness and management of information as the SA title. Use the table when mapping classroom notes or worksheet tags to an operator that grades against the CAA appendix. Full instructional wording: Module 02.

CAA public OB competency (this page)	MaxFli instructional 8 (Modules 01–08 / worksheets)
Application of knowledge	Application of Procedures / Knowledge *(merged with procedures for teaching)*
Application of procedures and compliance with regulations	Application of Procedures / Knowledge *(merged with knowledge for teaching)*
Communication	Communication
Aeroplane flight path management — automation	Aircraft Flight Path Management — Automation
Aeroplane flight path management — manual control	Aircraft Flight Path Management — Manual Control
Leadership and teamwork	Leadership and Teamwork
Problem solving and decision making	Problem Solving and Decision Making
Situation awareness and management of information	Situation Awareness
Workload management	Workload Management

When facilitating or grading under a CAA-adopting operator, **split** knowledge and procedures observations rather than filing both under the merged instructional row. Professional standards remain optional where the airline adopts them.

Related course pages

- Module 02 — Pilot competencies for instructors
- CAA Standards Document 29 alignment
- Observation sheet
- Competency notes template

Attribution: UK CAA public pilot competency appendix (Standards Document 29 framework). Operators may adopt local dictionaries — always follow the ATO/operator standard in force.

Section

Who may deliver a TRI course & TRI AoC

Who may deliver a TRI course and conduct a TRI Assessment of Competence

Scope: UK CAA application of Part-FCL (Subparts J and K), with practical guidance from CAA Standards Document 43 (TRI/SFI course providers) and Standards Document 24(A) Appendix 10 (examiner (a)(5) privileges). Aeroplane / MPA focus.

Important: Always verify against the current UK Aircrew Regulation (Part-FCL), the examiner's licensing certificate privileges, and the latest CAA standards documents. This page is a working summary for MaxFli course directors and candidates — not legal advice and not a substitute for ATO approval conditions.

1. Who may deliver a TRI course

Requirement	Who / what
Organisation	A UK CAA **Approved Training Organisation (ATO)** with approval to conduct the relevant **instructor course** (TRI / SFI as applicable). Any ATO may *apply* for that approval; delivery is only after approval.
Oversight	The ATO **Head of Training** (OR.ATO.110) is responsible for course standard and for training newly appointed Course Tutors (observation and supervised tuition).
Course Tutors (instructors on the TRI course)	Must be qualified under the Aircrew Regulation; **nominated by the ATO and notified to the CAA** before use on the course.
Tutor privilege (Part-FCL)	Tutors must satisfy **FCL.905.TRI(b)** and **AMC1 FCL.930.TRI**. In current UK CAA wording, privileges to instruct for the **issue of a TRI or SFI certificate** require the holder to: (i) have **at least 50 hours of instructional experience as a TRI or SFI**; and (ii) have conducted the flight-instruction syllabus of the relevant part of the TRI training course (**FCL.930.TRI(a)(3)**) **to the satisfaction of the Head of Training** of an ATO.
Recency	Tutors need regular practice; the HT ensures skills/knowledge are maintained and that out-of-recency tutors receive refresher training before delivering a course (Standards Document 43).
Device	Where FSTD training is used, the device must be appropriately qualified; Standards Document 43 expects a **full flight simulator** for the relevant elements.

MaxFli note: This MaxFli TRI pack supports ATO/instructor development. Delivery of a formal Part-FCL TRI course for licence/certificate issue still requires an **approved ATO course** and appropriately privileged tutors — not this pack alone.

2. Who may run an initial TRI Assessment of Competence (issue)

The initial TRI AoC (FCL.935 / FCL.935.TRI) is an **examiner** event, not a course-tutor event.

Requirement	Who / what
Examiner certificate	A **TRE** whose privileges include **FCL.1005.TRE(a)(5)** — commonly called **"(a)(5)"** privileges.
Experience & training	At least **3 years as a TRE**, plus **specific training** for instructor AoCs in accordance with **FCL.1015(b)** (and CAA evidence requirements for adding (a)(5)).
Equivalence	Examiners must hold an equivalent instructor level to those they assess (**FCL.1000** principle of equivalence). Example from SD24(A): a TRI restricted to FFS should be assessed by a TRE with matching TRI privileges (previous experience may satisfy policy).
Aircraft vs FSTD	Match the privileges sought: simulator-only TRI → AoC in FFS; unrestricted aircraft TRI → AoC in aircraft by an examiner with **full aircraft** privileges (SD24(A) A10.2.2).
Vested interest (critical for *initial* issue)	An examiner **shall not** conduct an AoC for the **issue** of an instructor certificate to an applicant **to whom they have provided flight instruction** during the instructor course (**FCL.1005** / SD43 4.2.3). Course tutors who taught the candidate on the TRI course therefore cannot be the initial AoC examiner for that candidate.
SFE	An **SFE** with **FCL.1005.SFE(a)(5)** may conduct AoCs for **SFI** certificates only — **not** for TRI.

On successful completion (and with required evidence), the examiner endorses the licence / licensing certificate as applicable.

3. Who may run a TRI AoC for revalidation (or renewal)

Requirement	Who / what
Same examiner privilege	**The same (a)(5) TRE privileges** cover AoCs for **issue, revalidation and renewal** of a TRI (or SFI) certificate (FCL.1005.TRE(a)(5); SD24(A) A10.1; SD43 4.2.3).
When an AoC is required	TRI revalidation/renewal follows **FCL.940.TRI**. An AoC in accordance with FCL.935 is required **at least every other revalidation** (i.e. at least every **six years**), alongside the other revalidation options in Part-FCL. Renewal pathways may require refresher training at an ATO plus AoC — check current FCL.940.TRI.
Training before AoC	All training for issue / revalidation / renewal of TRI/SFI must be by an ATO under an approved TRI/SFI course where training is required. If refresher training was done for revalidation, present the completion certificate to the AoC examiner (SD24(A) A10.2.1).
Multi-type	If TRI/SFI is held on more than one type in the same category, an AoC on one type normally revalidates the others in that category unless OSD says otherwise.
No training during AoC	Training of the instructor is **not appropriate during** an assessment of competence (SD24(A) A10.2.1).
Timing	If the revalidation AoC is within **12 months** of expiry, the new expiry is typically three years from the original expiry (extendable to end of month) — confirm current SD24(A) / Part-FCL wording.

Practical takeaway: Initial and revalidation TRI AoCs are both run by a **TRE with (a)(5)** (meeting the 3-year + specific-training conditions). The main *extra* constraint on **initial** issue is the **no-self-examining** rule after providing flight instruction on that candidate's instructor course.

4. Quick comparison

Activity	Organisation / person	Key Part-FCL / CAA refs
Deliver TRI course	CAA-approved **ATO**; **Course Tutors** meeting **FCL.905.TRI(b)** (+ AMC1 FCL.930.TRI); HT oversight	FCL.930.TRI; FCL.905.TRI(b); SD43 Parts 2–4
Initial TRI AoC	**TRE** with **FCL.1005.TRE(a)(5)**; ≥3 years TRE; specific AoC training; **not** the person who gave flight instruction on that course	FCL.935; FCL.1005.TRE(a)(5); FCL.1000; SD24(A) App 10; SD43 4.2.3
TRI AoC revalidation / renewal	Same **TRE (a)(5)** privileges; AoC at least every other revalidation (≥6 years) under FCL.940.TRI pathways	FCL.940.TRI; FCL.1005.TRE(a)(5); SD24(A) A10.2

5. Related MaxFli pages

- Course overview — aims and regulatory framing
- Module 06 — Assessment and AoC judgement
- CAA SD29 alignment
- ICAO Doc 9995 alignment

Sources (verify current versions): UK CAA *Type rating instructor (TRI)* and *Type rating examiner (TRE)* guidance pages; Part-FCL FCL.905.TRI, FCL.930.TRI, FCL.935, FCL.940.TRI, FCL.1000, FCL.1005.TRE / SFE, FCL.1015; CAA Standards Document 43 v5; CAA Standards Document 24(A) Version 6 Appendix 10.

Lesson plans

Lesson Plan LP-01

Lesson Plan LP-01 — Classroom: TRI Role & Instructional Mindset

Type: Classroom / workshop
Duration: 120 minutes
Module link: 01
MaxFli TRI Course

Objectives

1. Explain the TRI role relative to trainee, ATO, and safety outcomes.
2. Contrast expert-pilot vs facilitator behaviours with concrete examples.
3. Agree professional standards applicable on MaxFli contracted courses.

Competency focus (TRI candidate)

Professional Standards · Leadership & Teamwork · Communication

Timing

Mins	Activity	Instructor notes
0–10	Welcome, aims, entry experience map	Capture prior instructional background on whiteboard
10–30	Input: TRI role & stakeholders	Keep regulatory framing high-level; point to OM-D for detail
30–50	Pair task: rewrite “expert” responses into facilitator responses	Use four scenarios from Module 01
50–70	Plenary + Professional Standards brief	Model calm challenge of unethical pressure scenario
70–100	Group discussion: facilitation vs instruction decision points	Require justification, not gut feel
100–115	Individual commitment: “One behaviour I will change as TRI”	Write on self-reflection worksheet
115–120	Summary & link to Module 02	Preview observation exercise

Resources

- Module 01 handout / pack
- Flipchart or shared doc
- Worksheet — Trainee Self-Reflection

Success look-like

Candidates articulate facilitator behaviours without dismissing the need for directive instruction; professional standards discussion shows zero tolerance for unfairness or fabricated assessment.

Lesson plans

Lesson Plan LP-02

Lesson Plan LP-02 — Classroom: Competency Observation Practice

Type: Classroom / workshop
Duration: 180 minutes
Module link: 02
MaxFli TRI Course

Objectives

1. Apply the eight-competency instructional set to live or recorded observation.
2. Produce specific behavioural notes with competency tags (objective evidence — Doc 9995 Part I, 6.3.3 paraphrased; SD29 v9.1 observable CRM/NTS behaviours).
3. Convert notes into a tailored training focus statement; practise highlighting strengths, root-cause thinking, and behaviour→outcome links.
4. Flag any observed reduction in safety margins.

Competency focus

All eight (observation skill) · Situation Awareness · Communication

Timing

Mins	Activity	Instructor notes
0–20	Competency set walkthrough with airline examples	Do not read protected manuals; use Module 02 adaptations
20–40	Bad note / good note clinic	Candidates rewrite weak notes
40–55	Brief observation protocol	Event → fact → tag → park judgement
55–100	Observation exercise (video/role-play)	Individual notes; use observation-roleplay-brief if no clip
100–130	Pair calibration	Align tags; discuss disagreements
130–160	From notes to tailored focus	Each pair writes one next-scenario objective; include one strength + one root cause
160–180	Debrief of the exercise itself (meta)	What made observation hard? Link to sim workload

Resources

- Worksheet — Observation Sheet
- Worksheet — Competency Notes
- Short sim clip (ATO-approved) **or** Observation Role-Play Brief when no video library is available
- Optional richer stories later: Worksheet — Scenario Cards

Success look-like

Notes are specific enough for a third TRI to visualise events; include strengths and root causes; tailored focus references competencies/NTS, not vague “more practice.”

Lesson plans

Lesson Plan LP-03

Lesson Plan LP-03 — Classroom: Brief & Debrief Clinic

Type: Classroom / workshop
Duration: 180 minutes
Module link: 04 (supports 03 & 07)
MaxFli TRI Course

Objectives

1. Deliver a competency-framed brief covering Doc 9995-style **objectives** (minimum competency standard, handling, TEM) and **session structure**: Evaluation phase → Manoeuvres training phase → Scenario-based training phase (Part I, 7.3 paraphrased).
2. State TRI coaching level per phase (observe / active trainer / may intervene to develop).
3. Facilitate a debrief with ≥50% trainee talk-time; announce outcome early when assessing; include strengths (Part I, 7.8; SD29 facilitation / self-analyse emphasis).
4. Close with standard clarity and a tailored next step linked to Evaluation evidence; integrate CRM/TEM with technical themes (SD29 §8 / FSTD practice).
5. Practise a short **intervention-ladder** role-play (language only) — theory remains in Module 07; seat/IOS mechanics in Module 08.

Competency focus

Communication · Leadership & Teamwork · Problem Solving & Decision Making · Situation Awareness

Timing

Mins	Activity	Instructor notes
0–20	Model brief (MaxFli standard) then dissect	Show 7.3 objectives + three-phase structure, competencies, TEM/CRM, TRI role per phase
20–45	Candidates prepare 8–10 min briefs in pairs	Worksheet — Scenario Cards; must name Evaluation / Manoeuvres training / Scenario-based phases
45–85	Brief deliveries (2–3 pairs) + peer feedback	Rubric: clarity, phase, competencies, timing
85–100	Debrief structure input + question stems	Emphasise discovery then standard (Module 04)
100–135	Debrief clinic on common event set	Observers track facilitation vs lecture
135–165	**TEM / intervention-ladder clinic** (Module 07)	Role-play ladder steps 1–5 on one card event; observers score: realism, timing, facilitation discipline, safety control. Point to Module 07 workshop; do not expand TEM theory here. Phraseology/takeover → Module 08.
165–180	Lessons learned & homework for sim days	Bring one refined brief to FFS; note Module 07 clinic timing covered in this block

Resources

- Module 04
- Module 07 (intervention ladder / facilitation — reference)
- Worksheet — Scenario Cards
- Peer feedback notepad

Success look-like

Briefs state **Evaluation phase / Manoeuvres training phase / Scenario-based training phase** with matching TRI behaviour; debriefs produce competency/NTS-tagged outcomes (strengths + root causes) without TRI monologue; candidates can name and demonstrate proportionate ladder steps without turning the clinic into a second Module 07 lecture.

Note on Module 07 timing

Full TEM/facilitation input and IOS insertion workshop remain in Module 07 delivery. This LP-03 block is the **timed practice** of ladder language so Day 3 does not leave intervention un-drilled before sim days. Extend Module 07 contact time only if the cohort still needs theory depth after this clinic.

Lesson plans

Lesson Plan LP-04

Lesson Plan LP-04 — FFS: Evaluation Phase & Manoeuvres Training Phase

Type: Full Flight Simulator (instructional practice for TRI candidates)
Duration: 4.0 hours block (incl. brief/debrief) — adjust to device booking
Module link: 03, 04, 07, 08 · Doc 9995 Part I, 7.4–7.5 / 6.3.3 · SD29 v9.1 §8 / §10
MaxFli TRI Course

Objectives

1. Run an **Evaluation phase** segment: observe/assess; gather objective evidence; identify individual training needs; instructor normally does **not** instruct or interrupt (Doc 9995 Part I, 7.4 paraphrased); safety interventions only.
2. Transition into a **Manoeuvres training phase** with clear demonstration/practice loops; act as an **active trainer** on critical handling (Part I, 7.5 paraphrased) — not a line-oriented story.
3. Debrief distinguishing baseline Evaluation evidence from taught manoeuvre items; include strengths, root causes, and tailored next focus; integrate CRM/TEM observations with technical performance (SD29 v9.1 §8 / §10).
4. Demonstrate 6.3.3-style noting: behaviour→outcome, good performance, safety margins.

Competency focus (of the pilots under training — for observation practice)

Flight Path Manual · Flight Path Automation · Application of Procedures/Knowledge · Workload Management

TRI candidate focus: Professional Standards · Communication · Workload Management (session control)

Timing (example)

Mins	Phase	Content	Instructor notes
0–30	Brief	Name Evaluation → Manoeuvres training (+ optional Scenario-based); 7.3-style objectives; intervention policy per phase	TRI candidate leads under MaxFli tutor watch
30–75	Evaluation phase	Line-oriented normal ops + one moderate occurrence; observe/assess technical + NTS/CRM	Tutor prevents coaching creep; external-party roles OK
75–90	Short interim	Agree Manoeuvres training focus from Evaluation evidence	Keep crisp; individual training needs
90–150	Manoeuvres training phase	2–3 critical handling items; active trainer; reposition as required	Not line-oriented; demonstrations time-boxed
150–180	Scenario-based lite (optional)	Reinvest one skill; instructor may intervene to develop	Only if time/safety allow; contrast with Evaluation
180–240	Debrief + records	Outcome, strengths, themes, tailored plan, notes quality (6.3.3 / SD29 facilitation)	Tutor assesses TRI candidate

IOS / device notes

- Preload weather and failure plan; know remove paths.
- Agree freeze policy: Evaluation phase = rare; Manoeuvres training phase = allowed for teaching.

Success look-like

Clear behavioural difference between **Evaluation phase** (observe) and **Manoeuvres training phase** (active trainer); notes support a tailored statement with strengths/root causes and CRM/TEM tags; seat/control discipline sound.

Lesson plans

Lesson Plan LP-05

Lesson Plan LP-05 — FFS: Scenario-Based Training Phase — Facilitation & TEM

Type: Full Flight Simulator (instructional practice)
Duration: 4.0 hours block (incl. brief/debrief)
Module link: 04, 05, 07, 08 · Doc 9995 Part I, 7.6 / 7.8 · SD29 v9.1 §4.5 / §8 / §10
MaxFli TRI Course

Objectives

1. Brief and run a **Scenario-based training phase** with deliberate threats aligned to 2–4 competencies (competencies = aim; scenario = vehicle) — Doc 9995 Part I, **7.6** paraphrased.
2. Facilitate in-session: unlike Evaluation, **intervene or interrupt where necessary** to enable development; use the intervention ladder.
3. **Integrate, train, and evaluate CRM/TEM** in the operational (FSTD) environment — not only "mention CRM in the debrief" (SD29 v9.1 §4.5 / §8 paraphrased).
4. Adapt emphasis toward weaker competencies identified in a prior Evaluation phase when evidence is available.
5. Debrief TEM and decision-making with facilitation that encourages self-analysis; highlight good performance as well as errors.
6. Show tailor-up or tailor-down based on live evidence within approved objectives.

Competency focus (pilots under training)

Problem Solving & Decision Making · Situation Awareness · Communication · Leadership & Teamwork · TEM

TRI candidate focus: TEM craft · Facilitation · Leadership & Teamwork · Flight Path instructional SA

Timing (example)

Mins	Phase	Content	Instructor notes
0–35	Brief	Declare Scenario-based training phase; story; competencies/CRM aims; must-achieve items; TRI may intervene to develop	Preserve useful surprise if planned; contrast with Evaluation rules
35–140	Scenario-based training phase	Line-oriented story; one primary + optional secondary threat; TEM/CRM integrated with technical task	Modulate pressure; intervene to enable learning; protect objectives
140–155	Cool-down / admin in box	Stable state for shutdown training if required	Avoid new major faults
155–240	Debrief	Self-assessment → themes → standard → tailor outcome	Tutor scores facilitation ratio

Tailoring prompts (for TRI candidate)

- If crew coping: add time pressure or secondary environmental threat.
- If overloaded: remove secondary threat, allow procedure completion, then resume lighter branch.
- Record the choice in notes.

Success look-like

Threats feel fair and type-realistic; instructor intervention serves **development** (7.6); CRM/TEM taught and assessed in the box, not only named afterwards; debrief yields TEM narrative and competency-tagged next training; no “gotcha” design.

Lesson plans

Lesson Plan LP-06

Lesson Plan LP-06 — Classroom: Assessment Judgement & Course Integration

Type: Classroom / workshop
Duration: 120 minutes
Module link: 06 (integrates 01–08) · Doc 9995 Part I, 6.3.3–6.3.5 / 7.7 · SD29 v9.1 §8 / §10
MaxFli TRI Course

Objectives

1. Calibrate pass / further-training judgements on borderline cases (technical + non-technical / CRM).
2. Write assessment-quality notes using observable behaviours (competency / NOTECHS-style markers as used by the operator) and a further-training recommendation.
3. Practise fair, standardised judgement — do not soften or harden criteria solely for experience level (SD29 v9.1 §10.3 paraphrased).
4. Complete self-review against the TRI candidate completion checklist, including TEM/CRM instructional competence for the operational environment.

Competency focus

Professional Standards · Application of Procedures/Knowledge · Communication · Situation Awareness

Timing

Mins	Activity	Instructor notes
0–15	Training vs assessment reset	Rules must be announced to trainees
15–55	Case study judgements in groups	Three borderline cases — Worksheet — Borderline Cases
55–75	Plenary calibration	Explore disagreement respectfully
75–95	Notes upgrade exercise	Turn sparse notes into review-ready record
95–115	Completion checklist self-audit	Assessment — Course Completion Checklist
115–120	Personal action plan & course close admin	Feedback worksheet

Resources

- Module 06
- Worksheet — Borderline Cases
- Assessment — Course Completion Checklist
- Worksheet — Course Feedback

Success look-like

Candidates justify outcomes with evidence spanning technical and CRM/NTS; recommendations are specific; checklist gaps (incl. TEM/CRM teaching) identified before final observed seat.

Lesson plans

Lesson Plan LP-07

Lesson Plan LP-07 — Classroom: EBT Design Workshop

Type: Classroom / workshop
Duration: 150 minutes
Module link: 03 (supports 05) · Doc 9995 Part I, 7.3–7.6 paraphrased
MaxFli TRI Course

Objectives

1. Redesign a legacy “items list” detail into Evaluation → Manoeuvres training → Scenario-based training phases with matching TRI behaviour.
2. Complete a one-page design sheet (Module 03 §5): phase, competencies (aim), threats/topics (vehicle), must-achieve items, success look-like, tailoring rule, brief objectives.
3. Mark coaching intensity: observe (Evaluation) / active trainer (Manoeuvres) / may intervene to develop (Scenario-based).
4. State honest scope: instructor conduct alignment — not operator EBT programme approval.

Competency focus

Problem Solving & Decision Making · Application of Procedures/Knowledge · Workload Management · TEM theme

Timing

Mins	Activity	Instructor notes
0–20	Reset: three-phase structure + coaching intensity	Module 03 §3; no protected-text quotation
20–35	Competency vs tick-box contrast + design-sheet walkthrough	Module 03 §4–§5; competencies = aim
35–50	Issue legacy detail (ATO-sanitised item list)	Remove Operator-proprietary content; keep realistic shape
50–100	Group redesign workshop (Module 03 §7 steps)	Label phases; assign competencies/threats; one tailored branch; mark TRI behaviour per phase
100–125	Gallery walk / peer critique	Check: phase clarity, observable success, tailor rule, no objective drift
125–140	Plenary: best design features + common faults	Link forward to Module 05 / LP-08 for deeper scenario craft
140–150	Individual: refine one design sheet for sim days	Homework into Lesson Plan LP-04 / Lesson Plan LP-05; IOS mini-checklist lives in Module 08

Resources

- Module 03

- Sanitised legacy detail handout (ATO-prepared)
- Flipchart / shared doc for design sheets
- Preview: Worksheet — Scenario Cards (optional stimulus)
- Alignment companion: Alignment — ICAO Doc 9995 (auditor questions)

Success look-like

Each group can defend phase labels and TRI behaviour; design sheet answers all seven prompts; tailored branch stays inside approved objectives; candidates distinguish “EBT thinking on a type detail” from “approved operator EBT programme.”

Lesson plans

Lesson Plan LP-08

Lesson Plan LP-08 — Classroom: Scenario Design & Template Peer Review

Type: Classroom / workshop
Duration: 150 minutes
Module link: 05 (supports 07, 08) · Doc 9995 Part I, 7.6 paraphrased
MaxFli TRI Course

Objectives

1. Design a ~45-minute Scenario-based training phase session using the Module 05 template.
2. Peer-review against quality checks and design-fault list (gotcha, firehose, objective drift, unobservable, type-unrealistic, no exit).
3. Plan tailor-up / tailor-down from fictional Evaluation evidence; keep competencies as the aim.
4. Hand off one selected scenario toward FFS practice (Lesson Plan LP-05) with IOS planning awareness (Module 08 mini-checklist — mechanics only; TEM craft in Module 07).

Competency focus

Problem Solving & Decision Making · TEM theme · Workload Management · Application of Procedures/Knowledge

Timing

Mins	Activity	Instructor notes
0–15	Reset: Scenario phase purpose; intervene-to-develop vs Evaluation	Module 05 §1; contrast Module 03
15–30	Template walkthrough + threat classes	Module 05 §2–§3; ethical line → Module 07
30–40	Assign cards / house-type constraints	Worksheet — Scenario Cards; customise without copying OM
40–90	Individual or pair design on template	Primary 2–4 competencies; triggers; debrief hooks; tailor-up/down
90–120	Structured peer review (pairs swap)	Use peer-review quick score on scenario-cards worksheet; Module 05 §6 faults
120–135	Plenary: one strong design + one repaired fault	Select candidate scenario(s) for sim days
135–145	IOS hand-off note	Point to Module 08 IOS mini-checklist; do not re-teach TEM theory
145–150	Admin: file designs for Lesson Plan LP-05	Tutor keeps copies for observed seats

Resources

- Module 05
- Worksheet — Scenario Cards
- Module 05 design template (in module)
- Module 08 IOS planning mini-checklist (reference)
- Module 07 (TEM / facilitation — read, don’t duplicate)

Success look-like

Scenarios are coherent operational stories with fair threats; peer reviews catch gotcha/firehose; tailor options are written; at least one design is ready for Lesson Plan LP-05 with clear competencies and debrief hooks.

Section

Observation Role-Play Brief

Observation Role-Play Brief — LP-02 Protocol

Type: Classroom support brief (no video library required)
Duration: Fits inside LP-02 observation block (~45 minutes role-play + notes)
Module link: 02 · Lesson plan: Lesson Plan LP-02
MaxFli TRI Course · British English

Purpose

Run peer **observation practice** when an ATO-approved sim clip is unavailable. Candidates practise: event → fact → competency/TEM tag → park judgement (LP-02 protocol), using Worksheet — Observation Sheet.

Roles (rotate each round)

Role	Job
PF	Fly/decide the story aloud; show some strengths and one clear gap
PM	Support, challenge, or go quiet as scripted
TRI observer(s)	Silent; notes only — no coaching the role-play
Facilitator (tutor or nominated candidate)	Time-box; read setup; stop the scene; run calibration

Optional fourth player: **ATC / cabin** one-liners from a cue card.

Safety & professionalism (classroom)

- No mockery of startle or language difficulty.
- Stay type-agnostic; do not invent Operator SOP numbers.
- Observers write **facts**, not “careless” / “good pilot.”
- Stop immediately if the role-play becomes personal.

How to run (tutor script)

1. **Brief observers (3 min):** Remind protocol — Event → fact → tag → park judgement. Sheets out.
2. **Cast & setup (2 min):** Assign roles; give players 60 seconds with the scene card only (observers do not see the “hidden gap” line if you want cleaner evidence).
3. **Play (6–8 min):** Real-time or slightly compressed; facilitator may inject one ATC/cabin line.
4. **Stop & individual notes (5 min):** Three events minimum on the observation sheet.
5. **Pair calibration (8 min):** Align tags; discuss disagreements.
6. **Tailored focus (5 min):** One next-scenario objective + one strength + one root cause.
7. **Rotate** and repeat with a second scene if time allows.

Total for one scene ≈ 30 minutes; two scenes fit the LP-02 55–100 block with a short buffer.

Scene cards (use 1–2 per course)

Scene 1 — Approach energy & communication

Setup (read aloud): Descending for approach; ATC kept you high; configuration is late. PF wants to continue; PM is monitoring speed.

Players' private cues (optional):
- PF: Continue with confident tone; fixate on path, under-brief the go-around trigger.
- PM: Call "speed" once; then hesitate.

Observers should be able to tag: Flight Path · Situation Awareness · Communication · Professional Standards (stable approach policy — without quoting a specific OPS number).

Scene 2 — Automation surprise

Setup: Capturing approach mode; something on the FMA is not what was briefed (state a generic "mode not as expected" — no type-specific procedure text).

Players' private cues:
- PF: Startle; reach without callout.
- PM: Good FMA challenge after 2–3 seconds.

Tags: Flight Path — Automation · Communication · Situation Awareness · Workload Management.

Scene 3 — Diversion decision under time pressure

Setup: System degradation already handled; now choose continue vs divert with moderate fuel and weather at alternate.

Players' private cues:
- PF: Strong plan but closed to PM input.
- PM: Has a valid fuel concern; must decide whether to assert.

Tags: Problem Solving & Decision Making · Leadership & Teamwork · Communication · TEM.

Success look-like (for this protocol)

- Notes specific enough for a third TRI to visualise events.
- Strengths recorded, not only gaps.
- Tailored focus names competencies/NTS — not "more practice."
- Calibration disagreements resolved with evidence, not seniority.

Resources

- Worksheet — Observation Sheet
- Worksheet — Competency Notes
- Module 02 §5–§7
- Optional later link: Worksheet — Scenario Cards for richer stories once observation craft is warm

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Worksheets

Worksheet — Competency Notes

Worksheet — Competency Notes Template

MaxFli Aviation TRI Course
Use during / immediately after instructional or observed seats.

TRI / candidate: ___ **Date:** __
Trainee(s): _____ **Type / device:** __
Session objective: _____
Phase: *Evaluation phase / Manoeuvres training phase / Scenario-based training phase / Other:* __

Competency evidence grid

Record brief behavioural evidence. Leave blank if not observed — do not invent.

Competency / theme	Evidence of effective application	Evidence of development need
Application of Procedures / Knowledge		
Communication		
Flight Path — Manual Control		
Flight Path — Automation		
Leadership and Teamwork		
Problem Solving and Decision Making		
Situation Awareness		
Workload Management		
Professional Standards (as relevant)		
TEM		

Footnote — CAA set: If the operator uses the CAA public OB set, split **Application of knowledge** from **Application of procedures and compliance with regulations** when recording evidence (treat as separate rows for grading; keep the eight-row layout above as the MaxFli teaching standard). SA may be titled *Situation awareness and management of information*. See Modules 02 and 11.

Summary judgement (training context)

Overall progress this session: On track / Mixed / Significant gaps

Priority themes for debrief (max 3):
1.
2.
3.

Root cause (if below standard): _____

CRM/TEM integrated this session? Yes / Partial / No — notes: ____

Further training recommendation:

Agreed with trainee(s)? Yes / No — comments: _____

Signature: _____

Worksheets

Worksheet — Course Feedback

Worksheet — Course Feedback

MaxFli Aviation — TRI Development Programme
Confidential training-quality feedback · British English

Course dates: __ ***Location / device:*** __
Lead instructor(s): ___
Your background (optional): Aspiring TRI / Existing TRI refresh / Other _

Please rate 1 (strongly disagree) to 5 (strongly agree).

Statement	1	2	3	4	5
Aims and learning outcomes were clear					
EBT principles were practical, not only theoretical					
Pilot competencies were usable for observation and debrief					
Brief/debrief practice improved my instructor skill					
Scenario design / TEM content was relevant to type training					
FFS instructional practice was well organised and safe					
Assessment expectations for me as TRI candidate were fair and clear					
Materials (this pack) supported delivery and study					
MaxFli professional standard / tone met my expectations					
I would recommend this course to a colleague					

Most valuable element:

Suggested improvement:

Any safety or professional standards concern? (describe)

Optional name: _____ **Date:** ___

Thank you — feedback informs MaxFli Aviation continuous improvement.
MaxFli Aviation.

Worksheets

Worksheet — Observation Sheet

Worksheet — Observation Sheet

MaxFli Aviation TRI Course
British English · Competency-based observation

Observer (TRI candidate): ___
Date: __ ***Detail / session:*** _____
Crew / role-play: _____
EBT phase (circle): Evaluation phase · Manoeuvres training phase · Scenario-based training phase · Mixed

Primary competencies targeted:
1. ___ **2.** ___
3. ___ **4.** ___

Event log

Time / phase	What happened (observable facts)	Competency / TEM tag	Strength (S) / Need (N)

Patterns (complete after session)

Strengths observed (highlight good performance):
1.
2.

Training needs observed (note root cause, not only symptom):
1.
2.

CRM / TEM / NTS behaviours noted (technical + non-technical):

Behaviour to likely operational outcome (if repeated on the line):

Safety / intervention notes / margin concerns (if any):

Tailored next focus (one sentence):

Note — CAA set: Teaching standard is the MaxFli merged eight (see Module 02). If the operator uses the CAA public OB set, split Application of knowledge / Application of procedures when tagging, and SA may read *Situation awareness and management of information* (Module 11).

Observer signature: __ *Tutor review:* __

Worksheets

Worksheet — Trainee Self-Reflection

Worksheet — TRI Candidate Self-Reflection

MaxFli Aviation TRI Course
Complete after classroom clinics and each instructional sim seat.

Name: ___ Date: __
Activity: Classroom / Brief practice / FFS instructional seat / Other: ____

1. Intentions

What did I intend to develop as an instructor in this session?

2. What went well

List two instructional behaviours you are satisfied with (be specific).
1.
2.

3. What to improve

List two instructional behaviours to improve (observable, not vague).
1.
2.

4. Competency lens

Which pilot competencies did I help the crew develop — or fail to address?

5. EBT / facilitation

Did I match my coaching level to the phase (Evaluation phase / Manoeuvres training phase / Scenario-based training phase)?
Examples:

Where did I facilitate well? Where did I lecture too early?

6. TEM / CRM (operational environment)

How deliberately did I integrate, teach, and assess TEM and CRM in the session — not only mention them in the debrief?

Did I facilitate self-analysis and note both strengths and errors?

7. Next commitment

One concrete change I will make next session:

Signature: _____

Worksheets

Worksheet — Scenario Cards

Worksheet — Scenario Cards (type-agnostic)

MaxFli Aviation TRI Course
British English · For LP-03 briefs, Module 05 peer review, and LP-08 workshop
Reusable handouts — customise airport / type / weather to the house fleet without copying Operator manuals.

How to use

1. Assign one card per pair (or rotate).
2. Design or brief against the Module 05 template (competencies = aim; scenario = vehicle).
3. Peer reviewers check quality checks in Module 05 §1 and design faults in §6.
4. Facilitation prompts support Module 07 craft — do not turn the card into a gotcha script.

Card 1 — Weather & diversion pressure

Field	Content
Title	Weather & diversion pressure
Suggested phase	Scenario-based training phase (or Evaluation if used as baseline — announce rules)
Brief setup	Night sector into a destination with deteriorating weather. Fuel on arrival is adequate but not generous. Alternate is open but ATIS suggests a possible runway change and holding. Cabin reports a non-urgent passenger medical that may become time-sensitive.
Primary competencies	Problem Solving & Decision Making · Situation Awareness · Communication · Workload Management
Deliberate threats	Environmental (weather / holding) · Operational (runway change, commercial time pressure script — use carefully) · Human (startle / dual task with cabin)
Trigger ideas	ATIS update mid-descent; late runway change; cabin call during approach brief; optional secondary: moderate system advisory that forces automation/manual choice
Must-achieve (examples)	Stable approach criteria / go-around decision; fuel/diversion decision process; PM involvement before commit
Facilitation prompts	“What threats did you brief before top of descent?” · “What information did you still need before committing?” · “How did you protect the PM’s capacity?” · “If this repeated on the line, what would you change?”
Tailor-up	Add time constraint or second weather update after diversion decision.
Tailor-down	Remove cabin medical; allow full fuel brief; simplify weather to one clear alternate.

Card 2 — Automation surprise & mode awareness

Field	Content
Title	Automation surprise & mode awareness
Suggested phase	Scenario-based training phase; may follow a Manoeuvres block on automation/raw data
Brief setup	Busy TMA arrival. Cleared for an approach that requires mode/FMA discipline. A realistic automation or guidance behaviour (type-appropriate — e.g. unexpected mode, capture not as briefed, or need to revert to a simpler mode) appears during a high communication load.
Primary competencies	Flight Path — Automation · Situation Awareness · Communication · Application of Procedures/Knowledge
Deliberate threats	Technical (automation/guidance behaviour) · Environmental (busy ATC) · Human (expectation bias)
Trigger ideas	Mode/FMA not as briefed; ATC speed or level constraint during mode transition; optional PM distraction with radio
Must-achieve (examples)	FMA callouts / cross-check; path control; go-around if unstable; clear PF/PM roles under surprise
Facilitation prompts	“What did the FMA tell you — and when?” · “What was your shared mental model after the surprise?” · “Where did workload peak, and how did you trap it?”
Tailor-up	Add a late runway or weather change after the automation event.
Tailor-down	Reduce ATC load; freeze once to rebuild mode awareness, then continue lighter.

Card 3 — Technical degradation & CRM

Field	Content
Title	Technical degradation & CRM
Suggested phase	Scenario-based training phase
Brief setup	Cruise or early descent. A single significant system degradation appears (choose one type-realistic failure that forces procedure application and a plan — not a triple rare failure). Diversion or continuation remains a genuine crew decision.
Primary competencies	Application of Procedures/Knowledge · Leadership & Teamwork · Problem Solving & Decision Making · TEM
Deliberate threats	Technical (system degradation) · Operational (company/ATC information load) · Human (startle, conflicting priorities)
Trigger ideas	Failure at a moment that allows memory items + checklist time; cabin or company call during QRH; optional ambiguous MEL/dispatch follow-on (keep fair and type-realistic)
Must-achieve (examples)	Memory items / checklist discipline; PF flying / PM managing; decision briefed before irreversible commit
Facilitation prompts	“What was the threat story — not only the ECAM/EICAS message?” · “How did leadership and assertiveness show?” · “What would ‘good’ look like for the non-handling pilot?”
Tailor-up	Add environmental pressure (weather at diversion) after process is established.
Tailor-down	Hold secondary calls; allow uninterrupted checklist; re-enter with lighter branch.

Card 4 — Unstable approach & go-around discipline

Field	Content
Title	Unstable approach & go-around discipline
Suggested phase	Evaluation phase (observe) **or** Scenario-based (may intervene to develop) — **declare which**
Brief setup	Visual or instrument approach with energy management challenge (tailwind component, late descent, or ATC keep-high — pick one). Stable-approach / go-around policy is the learning hinge. Second approach available.
Primary competencies	Flight Path — Manual · Flight Path — Automation · Situation Awareness · Professional Standards (policy adherence) · Communication
Deliberate threats	Environmental (energy / wind) · Operational (ATC keep-high or late change) · Human (plan continuation bias)
Trigger ideas	Late configuration; speed trend high; unstable call expected by SOPs; optional PM challenge opportunity
Must-achieve (examples)	Recognition of unstable criteria; go-around flown to a safe path; clear callouts; second approach plan
Facilitation prompts	“What was your go-around trigger — and did both of you share it?” · “Where did continuation bias appear?” · “How did the PM’s challenge land?”
Tailor-up (Scenario only)	Second-order threat on go-around (e.g. weather or simple system advisory).
Tailor-down	Reduce energy challenge; rebuild in Manoeuvres-style loop, then lighter Scenario reinvest.
Phase caution	If **Evaluation**: observe; safety intervention only. If **Scenario**: may interrupt to enable development. Announce in the brief.

Peer-review quick score (optional)

Check	Y/N
Linked to stated competencies	
Threats realistic and fair	
Success possible with good TEM/CRM	
Tailor-up / tailor-down stated	
Avoids gotcha / firehose / no-exit	
Debrief hooks planned	

Reviewer: __ *Designer:* __ Date: ___

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Worksheets

Worksheet — Borderline Cases

Worksheet — Borderline Judgement Cases

MaxFli Aviation TRI Course
British English · Matches Module 06 §7 workshop themes · For LP-06
Type-agnostic. Do not invent regulatory pass/fail rules — use the operator/ATO standard you are briefed to apply.

Instructions (groups)

For each case, produce:

1. **Evidence summary** (observable facts only)
2. **Competency / TEM tags** (and CRM/NTS if relevant)
3. **Outcome** (continue / additional training / stop pending review / meet–not meet standard as applicable)
4. **Further training plan** (specific action, not “more CRM”)

Then compare plenary. If borderline remains after discussion — **escalate** (Module 06 MaxFli expectation); do not gamble quietly.

Case A — Borderline unstable approach continuation

Theme (Module 06 §7): Borderline unstable approach continuation

Narrative
Crew briefed a stable-approach policy. On final, speed was high and configuration late. At the published gate, the approach did not fully meet stable criteria. PF stated “continuing — correcting,” PM said “speed” once, then went quiet. Path remained within what you judge as recoverable; touchdown was firm but on the aiming zone. No go-around. Fuel and weather were not limiting. In the box, no safety intervention was required.

Hints for discussion
- One-off slip vs pattern?
- Leadership & Teamwork / Communication (PM assertiveness)?
- Professional Standards / Application of Procedures (policy)?
- What would “additional training” look like (Scenario Card 4 / Manoeuvres energy management)?

Group product	Notes
Evidence summary	
Competency / TEM tags	
Outcome	
Further training plan	

Case B — Excellent handling but closed leadership

Theme (Module 06 §7): Excellent handling but closed leadership

Narrative
PF flew an accurate manual path through a go-around and subsequent approach — Flight Path Manual evidence was strong. PF made all plan decisions unilaterally, interrupted PM inputs, and dismissed a timely PM threat call about fuel for the alternate with “I’ve got it.” Landing was successful. PM later said in debrief they “didn’t want to push.” Technical procedures were completed, mostly by PF prompting.

Hints for discussion
- Strengths must be recorded (Module 06 / Doc 9995 6.3.3 paraphrased).
- Leadership & Teamwork · Communication · TEM (threat not trapped as a crew).
- Would another TRI, with your notes, reach the same call?
- Training plan: scenario weighted to shared decision-making and PM empowerment — not more handling drill.

Group product	Notes
Evidence summary	
Competency / TEM tags	
Outcome	
Further training plan	

Case C — Solid process with one critical checklist error caught by PM

Theme (Module 06 §7): Solid process with one critical checklist error caught by PM

Narrative
After a system degradation, the crew ran memory items correctly and began the checklist with good workload split. PF (handling) called for a checklist item; PM skipped one critical step (or mis-read a branch) — then caught the error themselves on cross-check before irreversible action. They rewound, completed correctly, and briefed a sound diversion plan. Remainder of the session showed calm TEM and clear communication. No repeat of the checklist miss.

Hints for discussion
- Error trapped — resilience vs prevention?
- Application of Procedures · Situation Awareness · Communication (challenge/response).
- Sufficient sample for “meet standard” vs targeted practice?
- Notes must show the miss **and** the recovery; avoid “all OK.”

Group product	Notes
Evidence summary	
Competency / TEM tags	
Outcome	
Further training plan	

Plenary calibration prompts (tutor)

- Where did groups diverge — evidence, standard, or risk appetite?
- Did every group record **strengths** as well as gaps?

- Was the further-training plan specific enough for the next TRI?
- Any temptation to soften/harden criteria for “experienced” vs “new” crew? (Avoid — SD29 v9.1 §10.3 paraphrased; use the published standard.)

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Assessment

Assessment — Course Completion Checklist

Assessment — TRI Candidate Course Completion Checklist

MaxFli Aviation TRI Development Programme
Competency-based / EBT-aligned instructor development · British English

Candidate: ___
Course dates: __
Type / privilege target: TRI / SFI / other (state): _____
Tutor / Course Director: _____

This checklist records **MaxFli course completion evidence**. It does not replace the Authority / ATO Assessment of Competence for the grant of TRI privileges, nor a Flight Crew CRMT classroom appointment (UK CAA SD29 v9.1). Use alongside official forms required by the ATO.

A. Knowledge & professional foundations

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
A1	Explains TRI role, boundaries, and professional standards			
A2	Distinguishes facilitator vs expert-pilot behaviours			
A3	Describes EBT Evaluation phase / Manoeuvres training phase / Scenario-based training phase and coaching implications (Doc 9995 Ch 7 terms)			
A4	Uses ICAO-aligned competency set accurately for instructional discussion			
A5	Integrates TEM as an instructional theme (design, observe, debrief)			
A6	Explains Part FCL operational-environment TEM/CRM teaching vs classroom CRMT pathway (SD29 v9.1 awareness)			
A7	States Doc 9995 instructor focus areas (evidence, strengths, root causes, safety margins — 6.3.3 paraphrased)			

B. Briefing & debriefing

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
B1	Delivers brief stating objectives (competency standard / handling / TEM), phase structure, competencies, and intervention policy			
B2	Facilitates debrief with guided discovery and clear statement of standard			
B3	Balances both crew members; avoids personality labelling			
B4	Produces tailored next-training outcome from evidence			

C. Design & TEM

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
C1	Designs or adapts a scenario with competency targets and deliberate threats			
C2	Shows tailor-up / tailor-down logic without leaving approved objectives			
C3	Avoids gotcha / firehose design faults			
C4	Integrates CRM/TEM training into FSTD delivery (not only debrief discussion)			

D. Observation, notes & judgement

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
D1	Observation notes factual, tagged, review-ready; strengths + root causes; technical + CRM/NTS			
D2	Separates training vs assessment behaviours appropriately			
D3	Makes fair further-training / progress recommendations with evidence			

E. Practical FFS instructional skills

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
E1	Seat craft / control transfer discipline			
E2	Proportionate intervention ladder; safety prioritised			
E3	IOS / freeze / reposition used to serve objectives			
E4	Maintains instructional SA (aircraft + learner + plan)			
E5	Matches coaching intensity to declared EBT phase			
E6	Facilitates self-analysis; role-models CRM; assesses non-technical performance fairly with technical			

F. Attitude & professional conduct

#	Criterion	Evidenced (Y/N)	Initials / date	Notes
F1	Punctual, prepared, respectful, confidential			
F2	Receptive to tutor feedback; reflective practice completed			
F3	No integrity concerns (records, standards, fairness)			

Completion decision

Result	Tick
Completed to MaxFli TRI course standard — recommended to proceed to ATO/Authority AoC process as applicable	
Completed with development points — list mandatory follow-up before AoC recommendation	
Not yet complete — additional training required (specify)	

Development points / additional training:

Tutor statement: I confirm the evidence above is based on observed performance during this course.

Tutor signature: __ ***Date:*** _____

Candidate acknowledgement: I have discussed this outcome and any development points.

Candidate signature: __ ***Date:*** _____

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