



How to...

How to be a Chief Flying Instructor



CIVIL AVIATION AUTHORITY
OF NEW ZEALAND

Te Mana Rererangi Tūmatanui o Aotearoa



Every effort is made to ensure that the information in this booklet is accurate and up to date at the time of publishing. But numerous changes can occur with time, especially with regard to airspace and legislation. Readers are reminded to obtain appropriate up-to-date information.



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Thanks to the staff at Kapiti Aero Club, who allowed the CAA to interrupt their busy schedule, and take photos to illustrate this booklet.

CAA Web Site

See the CAA web site for Civil Aviation Rules, Advisory Circulars, Airworthiness Directives, forms, and more safety publications.

www.caa.govt.nz

Introduction

The Civil Aviation Rules do not define what a CFI does, or even what a CFI is. But we can rely on the opinions of those experienced in the role as to what makes a good one.

Here's what they think an effective CFI is:

- » an advanced and professional trainer, mentor and role model;
- » a leader who has the respect of instructors, students, those in industry, and those in governance;
- » an adaptable, resourceful administrator, and astute personnel manager;
- » a technical expert;

- » a setter of organisational 'culture', and someone able to pass on passion and motivation;
- » a persuasive communicator, a solver of problems, and resolver of conflicts; and
- » a mum.

A good CFI also has to:

- » proactively identify hazards and manage their associated risks – a particularly important job, with the introduction of Safety Management Systems (SMS), and the Health and Safety at Work Act 2015;



- » liaise effectively and diplomatically with the CAA, Airways, airport companies, MetService, the training school management and its staff;
 - » be a sharp observer;
 - » know how to delegate;
 - » be aware that their on and off-duty behaviour has a significant influence on the attitudes of others;
 - » be accountable;
 - » be where the buck stops;
- and through it all...
- » maintain a sense of humour!

With such a huge and varied number of personal and professional traits,

it's a wonder anyone wants to be a CFI, let alone can make a good job of it.

But there are plenty of pilots who want to be Chief Flying Instructors because of the same personal qualities that attracted them to aviation in the first place – the desire to excel.

Despite the daunting number of attributes needed to be effective, most full time flying instructors know at least one CFI who does possess those qualities.

This booklet is designed to assist CFIs newly appointed to an aero club or flight training organisation – or those about to be, or those who want to be – with the special responsibilities associated with the position.





Supervision

If a CFI has a critical role, then supervision is it.

A Chief Flying Instructor is responsible for the supervision of all instructor and student activities to ensure their safety.

That is, having oversight of the:

- » training programmes and how they're being delivered;
- » instructors' currency and ratings;
- » aircraft maintenance schedule;
- » organisation's safety policy and procedures;
- » resources available for training; and
- » in small organisations, possibly of the finances, and the day-to-day running of the place, including health and safety.

Please note that supervision is about contact, and the CAA does not believe it can be done satisfactorily, if done remotely.

C-Cat Supervision

For the first six months, or first 100 hours of their instructing career, whichever is the longer time, the C-cat must be directly supervised. While a senior instructor may be tasked with that job, the CFI has oversight of that supervision.

Supervising is a separate skill from instructing, and from being able to fly well. Done properly, it involves a written 'supervising instructing' plan that includes

the day by day activities of the C-cat, as well as their longer term goals.

The supervising instructor is always accessible to the C-cat to answer queries and help resolve issues.

A CFI should be continually encouraging their instructors to employ the techniques they have learned in their Instructional Techniques course. That should be supported by the organisation's own clearly laid out instructor manual, with sign-offs for teaching competency.

Organisations wanting systematic management of how newly minted instructors grow into certain privileges might have a graded scale of instructing activities. For instance, cross-country trips might be graded A to C, according to the experience or training required to fly them. Or the C-cat may for a while be confined to pre-circuit lessons, or restricted in their use of the low-flying area.

After that six month/100 hour period is over, the CFI can use other less obvious forms of supervision. For instance, having a coffee with the C-cat, and monitoring their non-flying behaviour in other ways, or asking local air traffic controllers their opinion.

Regularly review the flying practice and teaching ability of junior instructors. Use a risk-based approach to whether they require more or less supervision.

The CFI also has oversight when a C-cat takes the next step of becoming a B-cat.

Managing Training Programmes and Delivery

A good CFI keeps an eye on how flying theory is being covered by their instructors. They also monitor the progress of trainee pilots in this crucial area.

The appropriateness of lesson sequencing also requires CFI oversight. Where does a particular lesson belong logically, given the student's progress so far?

The Chief Flying Instructor also ensures briefings and instruction are of a high standard.

Something as simple as regularly sitting in on briefings can reveal a great deal.

For instance, is it evident that an instructor doesn't really understand why they're teaching a particular manoeuvre? If they don't, they can unwittingly communicate to the trainee pilot that it's unimportant. So the CFI, in questioning the instructor as to the 'why' of a lesson, can improve their understanding, and future teaching practice.

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The occasional surprise flight with an instructor and their student allows the CFI to know if the instructor is consistent in their approach. It can also help the CFI and instructor with issues like the dreaded 'student plateau' where the student, much to the perplexity of their instructor, fails to make progress beyond a certain step. Such a situation could destroy the student's confidence and motivation, let alone what it does to the instructor, particularly a new one. A ride-along will allow the CFI to know if, for instance, the instructor is overwhelming the student with too much information, or underwhelming them with too little.

Does the instructor treat the student with respect? How about students from overseas, or those returning to flying after

a break? Or someone skilled and qualified elsewhere in the aviation system – an airline captain, for instance, who's getting re-current in a Cessna 172? CFIs want to be sure those situations are being treated with diplomacy, and the appropriate needs assessment.

Is the instructor taking their student into flying territory the instructor is actually not altogether capable of? Or has an overly enthusiastic instructor thought of a random 'neat idea' and is teaching that, without approval and outside Standard Operating Procedures?

Another way to check student progress and instructing standards, is to regularly dip into student training records. Is the instructor following the training programme and keeping documentation current?

Instructor Development

In terms of instructors' own needs, their currency and assessments are to be kept updated, and records on this also kept up to date. Instructors can be checked more often than once a year. It doesn't even have to be a formal check or test, more of a training session, but it keeps instructors interested and motivated.

It's the CFI's responsibility to create the sort of work environment where even those instructors whose ultimate goal is a job with the airlines are kept inspired about their teaching role.

How are the instructors at your organisation encouraged and supported? How many have been offered extra and interesting responsibilities? How many are given the opportunity to extend their flying skills – some extra training at the time they complete their flight instructor renewals, for instance?

Flight Tests

It's up to the CFI to ensure students can properly fulfil the requirements of a flight test when they're put up for one.

That means booking the Flight Examiner *only* when the instructor truly believes the student is ready and competent, and isn't likely to just scrape through on the day. It's part of the CFI's responsibility to that trainee pilot's future passengers to make sure they really understand what good flying involves.

Experienced Flight Examiners say it's disturbing that either, or both, instructor and

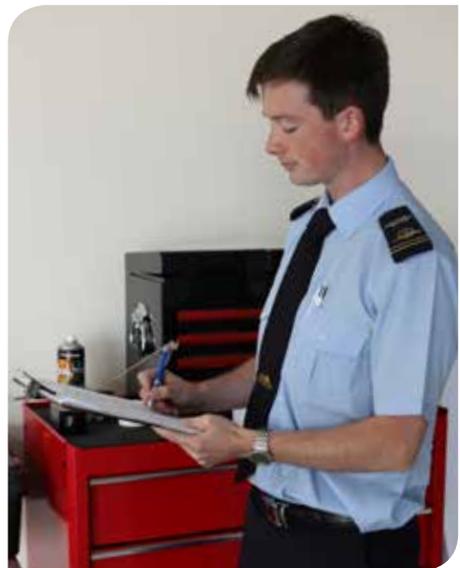
student are sometimes pressured to book a flight test when they know it's really too soon.

Training Students in Maintenance Requirements

Instruction in basic aircraft maintenance is part of any student's tuition.

The proper use of the Technical Log is particularly important, as is checking it, as part of a thorough preflight. By questioning the student, the CFI will get a good idea of their understanding of its significance.

A CFI who has a good relationship with their maintenance provider could get students (and instructors) to visit when the aircraft is in maintenance: for instance, cowlings are off, and maybe the flight controls have been removed, or during an engine change.



The CFI needs to have oversight of the maintenance schedule. (See p12)

Record Keeping

Document Everything

Chief Flying Instructors are not always on site. They may be flying, or sick, or on holiday.

Well documented processes will allow a senior instructor to slip into the role of acting CFI, and the organisation to continue without hiccups.

Also, students are often taught by more than one instructor. A system where information about the student's training, progress and timetable is standardised will make that information easily accessible to everyone, especially relief instructors.

Logbooks

To be of any use, logbook notes call for transparency. All interventions, even informal ones, are to be recorded. For instance, if the CFI watches how a C-cat instructs the student in the cockpit, the instructor notes in the student's logbook 'CFI observed lesson'.

Signatures in logbooks show legal accountability, so are signed only if the logbook entries are correct. Flight test fails, and remedial training, are to be recorded in both the logbook and training records.

The CAA recommends that all student pilots, and instructors if necessary, receive a tutorial on how to fill out a logbook correctly.

Training Records

Training records elaborate on logbook entries with more space for a fuller description of ground and flight training.

They facilitate continuity in the training programme for both the student and instructor. In particular, they support communication between a regular and relieving instructor.



Documenting all processes means that if the CFI is off site, a senior instructor can seamlessly fill the role, as was the case when the CAA called on the Kapiti Aero Club.

Operational Matters

Safety Management Systems

If your training organisation is certificated under Part 141, it's necessary to have a Safety Management System (SMS).

That's a formal set of processes to identify hazards and deal with their associated risks. A Chief Flying Instructor has to understand their organisation's obligations under an SMS. See www.caa.govt.nz/sms for more, including links to the rules and Advisory Circular.

If you are operating under Part 61 only, consider the benefits of also having an SMS.

Health and Safety

The Health and Safety at Work Act 2015 assigns responsibilities to organisations and certain individuals, calling them a Person Conducting a Business or Undertaking, or PCBU.

The Act shifts the focus from monitoring and recording health and safety incidents, to proactively identifying and managing risks. It is very much like a Safety Management System in this respect.

Be aware of your responsibilities and the communication required under the Act.

Supervision of Aircraft Maintenance

Contrary to what some people believe, it's not the responsibility of the maintenance provider to make sure each aircraft has an up-to-date Technical Log. That duty – and the one to ensure there's a current and complete tech log in each aircraft cockpit – falls to the aircraft's operator. In a small organisation, the CFI may well be the operator's representative. Whoever is deemed responsible, the CFI must have oversight.

The CFI also knows when the aircraft is coming up for inspections and other regular maintenance.

The CFI has to be thoroughly familiar with the rules associated with:

- » Pilot maintenance (43.51(b)(1) and (c)(1));
- » Instrument and Equipment Requirements (Part 91 Subpart F);
- » Operator Maintenance Requirements (Part 91 Subpart G).

Many CFIs rely on the training organisation's maintenance provider for this technical know-how, but it's important that a CFI comes to terms with maintenance basics. They could begin by attending a Maintenance Controller Course.

Build a good relationship with your maintenance provider. Visit them from time to time for a chat, especially when an aircraft is in pieces. Most engineers are happy to explain what they are doing and why.

Money Nous

The CFI may be expected to understand their organisation's business processes.

Proper financial planning has a significant effect on safety. For example, organisations should not be surprised when an engine has to be overhauled.

If a CFI suspects they don't have the financial skills required, they could employ someone else to do the bookwork. But they still have to retain oversight.

Time Management

Making the most of time is especially important in aviation because it is so weather-dependent. Remember that rushing, and time constraints, are often factors in accidents.

Here are some time tips:

- » Take whatever time is necessary to come up with a quality solution to problems, even urgent ones.
- » Plan the day ahead but be flexible.
- » Establish a culture that respects the booking book – each flight planned so it returns in time for the next.
- » Don't try to please everyone.
- » If you're not naturally a good organiser, learn how to be one.

Four Management Skills

- » **Delegate** – give instructors extra roles and responsibilities to encourage them, allow their development, demonstrate trust in them, and reduce CFI workload.
- » **Communicate effectively** – state objectives clearly, provide a timeframe, maintain written or electronic records, and welcome input and feedback.
- » **Collaborate effectively** – value and celebrate others' ideas, work to build rapport. One experienced training manager makes a habit of sending a personal note, by mail, to employees to congratulate them for good work. Such acknowledgement creates 'buy-in' which ultimately helps the CFI.
- » **Think critically** – to solve a problem, identify it, collect information about it, decide on the probable cause, identify possible solutions; select the best one, plan its implementation, test it, review and assess it.

Communication

Effective Communication

Asking for feedback is the best way of making sure messages to instructors and students have been correctly understood. The CFI also gets an idea of the quality of their own communication.

The CFI is responsible for opening up the lines of communication, not the instructor. That means the CFI *actively* searching out opportunities to do that.

Communicating the Purpose of the Organisation

Any mission statement, reflecting the purpose, goals, and values of the organisation, calls for plain English, and a concrete meaning.

If it's to be taken seriously, the CFI has to be able to relay in a meaningful way, to new students, staff, and committee or board members, what the mission statement means.

Liaising with the Committee or Board

One of the most delicate relationships a CFI will have to negotiate is that with board or committee members. Ideally governance decisions don't tip over into the day-to-day management of an organisation, but the line is often blurred. The same people may serve in both areas, or move from one area to another.

The CFI of an aero club may maintain close relationships with some people on the aero club committee – they may have trained together and known each other for years.

A CFI might find themselves being pulled in every direction by strong-minded committee or board members. How does a 21-year old B-cat CFI deal with a 65-year old long-time committee member used to doing things a certain way?

It helps if there are very clear lines, written down and understood by both parties, about where the boundaries are between governance and management.

It's true that the CFI is the committee's employee, and that the committee may have ultimate control of the money. But the CFI might have to make clear from the outset that his or her decisions are made in the interests of flight safety, the organisation's interests, and according to the rules.

A small non-certificated flying organisation flies on the licence of its instructors, so the CFI has to be comfortable with what's being done, and the way aircraft are being used.

On the other hand, some CFIs can be overly controlling, and that makes them the problem. People who take on the role of a Chief Flying Instructor have to be very self-aware, and willing to examine their role in any conflict.



A CFI needs a mentor too: that could be another CFI, a Flight Examiner, or the chair of the board or committee.

Conflict Management

The Chief Flying Instructor has to be effective in managing conflict, and that involves certain personal qualities. They have to be able to consider criticism without getting defensive. The self-aware CFI encourages and accepts feedback, and works to make right the troubling issue.

Quickly follow problems up, review how the chosen solution has fixed them, if it has. Get an answer back to that committee or board member, staff member, or student's parents as soon as possible. Then review how the situation arose and what can be done to ensure it's not repeated.

Managing relationships between the students, instructors, and committee or board members is made easier by a 'just culture'. Part of that is people being able to report problems without being targeted for it.

Mentoring

Mentoring is not the same as instructing. An instructor teaches a skill. A mentor builds a relationship and trust, and is available for advice and guidance.

That starts with their own willingness to positively coach and counsel others in the organisation. Their instructors know they can have a chat over a cuppa. Junior instructors know they can ask their seniors for help without feeling humiliated, or considered a nuisance.

A CFI, keen to establish free flowing communication in their organisation, takes an interest in their instructors' and students' lives, not just in their flying.

And a self-aware CFI also appreciates that they, too, need a trusted mentor from time to time, and that it's not a weakness to seek advice and support. A good CFI works to eliminate any 'instructors-as-gods' mentality.

Emergency Planning

If the organisation has a Chief Executive Officer, normally that person would deal with the aftermath of an accident, or similar crisis. But often that job falls to the CFI.

Experienced Chief Flying Instructors say dealing capably with what happens, and what is expected, in the first few hours after an accident, really only comes from experience.

But they say it certainly helps to be prepared, with a flight following system,

and an overdue/emergency action plan ready to go, and regularly practised by all staff.

Ideally, an emergency response plan will have:

- » Overdue, emergency, and accident response charts.
- » An accident notification form.
- » A staff and emergency contacts list.
- » An aircraft contents register (first aid kits, survival packs, life jackets, life raft).



Keeping a copy of an emergency response plan in the office, and with each key staff member, means that in the CFI's absence, the plan can still be implemented as it is intended to be.

- » A list of aircraft equipment (such as a transponder or GPS) and an up-to-date photo of the actual aircraft. Sometimes small details will identify an aircraft.
- » A generic media release.
- » A list of the people most appropriate to speak to the media. Note that the person most involved in responding to the emergency itself should not also be a media spokesperson.
- » A list of tasks in response to the emergency, and who will be assigned them. Also the

name of the person who will coordinate that, and log the tasks as they are done. That person can also be the central point of contact for the rest of the staff.

The CFI carries this emergency response plan with them. But keeping a copy in the office, and with each key staff member, means that in the CFI's absence, the plan can still be implemented as it is intended to be.

Experienced CFIs say possibly the most difficult task in the immediate aftermath of an emergency, perhaps when there is no real information, is dealing with distressed families. It's important that a staff member with natural empathy be appointed to liaise with them. While that person's role is to stay in regular contact with the family, if there's been a death, it's not the job of anyone at the training organisation to tell the family – that's for the police.

Another tough job is dealing with the media. Because of social media, reporters can know about an accident before a CFI does.

The worst thing to do is lock the doors and draw the curtains. Giving reporters no information may lead them to getting comment from anyone, possibly making things worse.

That's why it's wise to have a generic media statement – with just a few details needing to be filled out – ready to go.

While being polite to reporters, it's crucial the spokesperson does not speculate on possible causes of the accident.



Obligations

The CAA regards CFIs as experienced flight instructors who have agreed to take a leadership role in the training of student pilots. While an additional aviation document is not required to be a CFI, they are still exercising the privileges of their CPL and flight instructor rating.

The CFI has to have a good working knowledge of the rules and a willingness to abide by and respect them.

Section 12(3) of the Civil Aviation Act 1990 requires that flight instructor activities be carried out safely and in accordance with the relevant prescribed safety standards and practices. Instructors are also responsible under s12(3) for the safety of the students.

Under the rules, flight instructors have specific responsibilities for student pilots, in particular, the monitoring of solo flights, under rule 61.105(a). For instance, a student

pilot must have received dual instruction with an A or B-cat instructor within the five hours immediately prior to any solo. (61.105(a)(7)).

Advisory Circular AC61-2 sets out the CAA's expectations in terms of monitoring student pilots' solo flights, as follows:

- » The flight instructor is present at the aerodrome and conducts a preflight briefing;
- » The flight instructor provides guidance on the areas through which the flight is to be conducted;
- » The flight instructor is present at the time of the flight as applicable, whether on the ground or in another aircraft, and whether in the same airspace or not;
- » A flight instructor monitors the radio frequency in use where possible.



You're Not on Your Own

A CFI is not infallible. Especially at the beginning, they will need help, mentoring, and advice. For some, the hard part can be admitting they do. Then it's easy.

There's a plethora of resources within the CAA – key personnel including the Aviation Safety Advisers and Licensing and Flight Training staff (licensing@caa.govt.nz), safety promotion products such as GAP booklets like this one, the web site, and AvKiwi Safety Seminars.

Remember these as well:

- » Flight Instructor Guide;
- » Flight Test Standards Guides;
- » *Vector* magazine;
- » CASA's safety magazine, *Flight Safety Australia*, and CASA video resources.

As for mentoring, or just kicking ideas around, don't be afraid to ask (they'll be flattered you value their counsel) other CFIs, including former ones, Flight Examiners, your A-cat, or the company or club president or owner.



A good CFI gives instructors the opportunity to extend their flying skills – for instance, some extension training at the time of their annual flight instructor renewal.



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