

# Pilot Car Escort Training Materials and State Certification Harmonization

March 2015



U.S. Department of Transportation  
Federal Highway Administration

# The Need for the Project

- Growing Recognition of the Need for Pilot Car Escort Operator Certification
- Lack of Certification Harmonization
  - No National Guidelines
  - Lack of Reciprocity
  - 12 States require certification
  - Training and certification offered by States, Academia and Private Sector
- Stakeholder Support
  - AASHTO
  - CVSA
  - Industry
- NTSB Accident Report Recommendations



NTSB Accident Report NTSB/HAR-14/01 PB2014-10639:  
“Collapse of the Interstate 5 Skagit River Bridge Following a  
Strike by an Oversize Combination Vehicle Mount Vernon, WA”  
May 23, 2013

- Recommendation H-14-12 to FHWA, CVSA and SC&RG:
  - Work together to revise the Pilot Car Escort Best Practices Guidelines and related training materials to ensure that they contain updated recommended practices for pilot/escort vehicle operations, and disseminate the revised documents to groups that provide pilot/escort vehicle driver training.
- Recommendation H-14-21 to AAMVA
  - Institute, with the assistance of the American Association of State Highway and Transportation Officials and the Commercial Vehicle Safety Alliance, a model training and certification process that includes reciprocity of certification in all 50 states, the District of Columbia, and the Commonwealth of Puerto Rico for drivers of pilot/escort vehicles, based on the Pilot Car Escort Best Practices Guidelines.

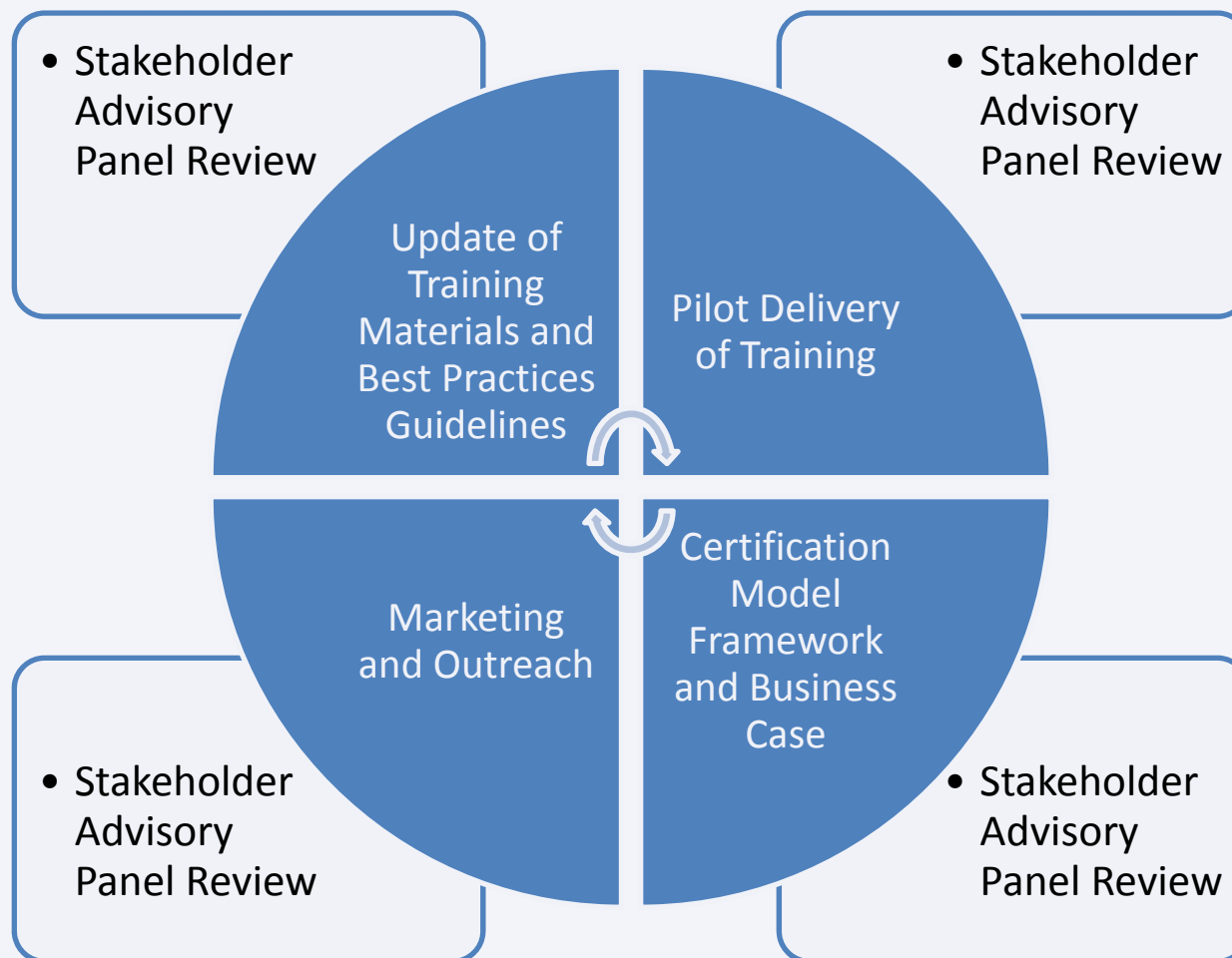


# Project Objectives

- Update the 2004 pilot car escort guidelines and training materials.
- Research and recommend a national certification program or process framework for the pilot car industry including guidance on national standards and core operator competencies.
- Develop a marketing plan, outreach materials and a business case (for a national certification program or process) and supporting stakeholder outreach and education.



# The Process: How We Will Get There



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- Iterative Approach
- Research on existing training and certification programs
- Extensive Stakeholder Involvement
  - Stakeholder Advisory Panel
    - Chaired by FHWA
    - Representation from pilot car industry, state governments, associations, law enforcement and end-users
    - Peer review of draft training materials and model certification framework
  - Presentations at Stakeholder Forums
    - CVSA Size and Weight Committee
    - AASHTO Highway Policy Subcommittee
    - Specialized Carriers & Rigging Association
    - Manufactured Housing Institute
  - Stakeholder Pilot Training Delivery



## Who We Are: The Project Team

- The Sponsor: Federal Highway Administration
  - John Berg, Government Technical Manager
- Project Team
  - Nick Owens, Leidos
    - Project Manager
  - Steve Barnes, National Pilot Car Safety Institute
  - Dr. Ann Hamilton, Oklahoma State University
    - Training and Guidelines
  - Steven Todd, Specialized Carriers & Rigging Association
    - Certification Framework
  - Monica Worth, Leidos
    - Marketing and Outreach
  - Stephanie Sneary and Julie Lambert, Leidos
    - Technical Support



# Stakeholder Advisory Panel Membership

- Federal Highway Administration (FHWA)
- American Association of State Highway and Transportation Officials (AAHSTO)
- Commercial Vehicle Safety Alliance (CVSA)
- American Association of Motor Vehicle Administrators (AAMVA)
- Manufactured Housing Institute (MHI)
- Owner Operator Independent Drivers Association (OOIDA)
- Specialized Carriers & Rigging Association (SC&RA)
- Pilot Car Industry
- Insurance Industry





# Project Outcomes: Training Materials

Title	Format	Content
<b>Pilot Car Escort Best Practices Guidelines</b>	Abbreviated/bulleted format	Checklists to facilitate operations and trip planning
<b>Law Enforcement Officer's Best Practices Guidelines</b>	Quick reference manual	Definitions and guidance for law enforcement
<b>Pilot Car Escort Training Manual</b>	Detailed training manual	Overview of the purpose and need for pilot car escorts, detailed guidance for the subject, and general reference material
<b>Pilot Car Escort Study Guide</b>	Study questions organized by study topic	Questions organized by study topic
<b>Training Presentation</b>	PowerPoint presentation	Slides and speaker notes developed to complement the Pilot Car Escort Training Manual

# Project Outcomes

- Training Materials
  - Available in public domain
  - Developed using publicly available information sources
  - Proprietary information will only be used with prior approval and will be appropriately referenced
- Development of Outreach Materials and a Marketing Plan
- Development of a Model Certification Framework
  - Enhanced Harmonization of State Certification Programs



# Proposed Pilot Escort Vehicle Training

Module	Instructional Methods	Representative Training Day
Course Overview and Introductions	Lecture, Participant Introductions	8:00 AM to 8:30 AM
Pilot Escort Operator and Vehicle Equipment Requirements	Lecture, Audio Visual	9:00 AM to 9:30 AM
Route Planning	Lecture, Audio Visual, Facilitated Discussion	9:30 AM to 10:30 AM
BREAK		10:30 AM to 10:45 AM
Pre-Trip Activities	Lecture, Audio Visual, Facilitated Discussion	10:45 AM to 12:15 PM
LUNCH		12:15 PM to 1:15 PM
Trip Operations	Lecture, Audio Visual, Facilitated Discussion	1:15 PM to 3:15 PM
BREAK		3:15 PM to 4:00 PM
Certification Test	Multiple Choice Test	4:00 PM to 4:30 PM



# Pilot Car Escort Vehicle Training

- Module 1: Course Overview and Introductions
  - The Pilot Car Industry
  - Course Overview
    - Modules
    - Reference Materials
  - Ground Rule
  - Participant Introductions
- Module 2: Pilot Car Escort Operator and Vehicle Equipment Requirements
  - Pilot Escort Operator
    - Valid License
    - Understanding of Federal Motor Carrier Safety Regulations
    - Health Assessment
    - Personal Equipment
  - Equipment
    - Vehicle
    - Lighting and Signage
    - Safety
    - Navigation and Communication
    - Managing Liability
      - Cameras and Voice Recorders
      - Journals



# Pilot Car Escort Vehicle Training

- Module 3: Route Planning
  - Route Planning
  - Conduct Route Survey
    - Identify railroad crossings, utilities, bridges, work zones
    - Identify rest stops
  - Identify State requirements
    - Permitting
    - Route Restrictions
    - Operational
  - Enforcement
    - Location of Weigh Scales and Inspection Facilities
    - Knowledge of North American Standard Inspection Requirements
- Module 4: Pre-Trip Activities
  - Safety Meeting
    - Roles and responsibilities
    - Routing
    - Use of Equipment
    - Communications protocol
  - Pre-Trip Vehicle Inspection
    - Lead Pilot Car
    - Trail Pilot Car
    - Load Power Unit
    - Load Securement and Divisibility



# Pilot Car Escort Vehicle Training

- Module 5: Trip Operations
  - Vehicle positioning on Roadways and Highways
  - Rural and Urban roadway/highway Operations
  - Bridges and Interchanges
  - Traffic Control
  - Equipment Use in-Route
  - Route Specific Challenges
    - Bridges
    - Railroad Crossings
    - Utilities
  - Emergency and Contingency Planning
- Module 6: Certification Testing
  - Multiple Choice
  - Comprehensive
    - Tests all knowledge areas
  - Passing Grade
    - Overall score
    - Specific knowledge areas



# Certification Framework

- Review existing certification models
  - Commercial Vehicle Safety Alliance (CVSA) and the Federal Motor Carrier Safety Administration (FMCSA) North American Standard Inspection Program
  - National Commission for the Certification of Crane Operators (NCCCO)
  - Existing state pilot car operator certification programs
- Develop a flexible approach
  - Training and certification can be done by a state or vendor



# Certification Framework

- Harmonization
  - Establish national certification guidelines
    - Pilot Car Escort Best Practices Manual
  - Tiered approach for certification
    - Basic certification
    - Specialized certification
- Issues to be addressed
  - Reciprocity
  - Keeping national certification guidelines current
    - Who is responsible for periodic updates
  - Assuring conformity with guidelines
    - Who is responsible for ensuring conformance:
      - State-level
      - National-level
  - Continuing education requirements





# Marketing and Outreach

## Approach:

- Attain the focus of key audiences and tap their motivation to act.

## Key Concepts:

- What are we trying to accomplish?
  - Implementation, not outreach, through a specific commitment to achieving the outcome of the entire effort.
- Who do we need to move to get there?
  - People adopt in waves;
  - Triggered by influence of people in the wave before them;
  - Leverage behavior research to identify and organize individuals on a curve that accelerates adoption.
- What do they need to hear to move?
  - Articulate the vision, facts, and shared values that motivate target audiences;
  - Mutual benefits form the spine of these messages.



# Marketing and Outreach

- Tools and Media - Where do they get their information?
  - Media, methods, opportunities determine communications tools needed and the style and “voice” appropriate to each opportunity and audience
- Managing Plan:
  - Develop work plan and timeline;
  - Identify implementation leads;
  - Develop benchmarks and performance measures to define success.
- Progress to Date:
  - Framework for marketing/outreach plan developed;
  - Initial meeting with project personnel held to begin to populate plan. Rough draft expected early March;
  - After feedback from project principals, prepare draft for discussion with the Stakeholder Advisory Panel.



# Questions?

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