

# Guidance for Establishing a VFR Mentoring Scheme

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## 1. Introduction

- 1.1 This document is designed to provide a framework for you to establish a local or individual VFR Mentoring scheme.
- 1.2 The framework is open for anyone to use as a guide to establishing their own scheme; Organisation, Aircraft Group, Aircraft Owner. You do not have to be a member of AOPA UK. AOPA offer you the opportunity to have your scheme or individual mentor details listed on the AOPA UK website, allowing other pilots the facility to make contact if they are looking for a mentor.
- 1.3 The purpose of such a scheme is to encourage pilots to build on their ab-initio training, gaining experience and confidence outside an instructional environment with the support and encouragement of more experienced peers. Most importantly, enjoy their flying and extend their flying activities for many years.
- 1.4 Such a scheme is not an alternative to formal instruction, but rather complements and embeds the lessons learned under instruction. **Only a qualified Instructor, with a current rating, may give instruction.**
- 1.5 For Corporate Businesses and Aircraft Groups, the opportunities for a well-run and supported mentoring scheme include:
- Selling more flying hours
  - Reducing the drop-out rate of new pilots
  - Selling training for additional ratings and differences
  - Building a good social atmosphere to attract new business
  - Make your Aircraft Group more attractive to shareholders
- 1.6 A mentoring scheme can be further complemented by adopting the AOPA Wings Award scheme, endorsed by the CAA under the PROUD initiative.

## 2. Legal and Insurance Advice

- 2.1 AOPA have taken legal advice from a senior Aviation solicitor to identify any potential liability to Mentor, Owner/Operator of the aircraft used for a mentored flight and/or the Organisation or Mentee connected to the mentoring flight.
- 2.2 AOPA were advised:
- that a mentor should meet defined minimum criteria relating to their piloting experience and skills
  - that operating rules for a mentoring flight should be defined and made know to Mentors and Mentees
  - that there was a risk, probably slight, of litigation against the Mentor, Mentee and AOPA, or the operator of any registered Mentoring Scheme, in the event of a life changing, or fatal, injury to any party on a Mentored flight.
- 2.3 The solution put forward was to subrogate the aircraft insurance to include all parties associated with a mentored flight.
- 2.4 At a meeting of representative Insurers and Underwriters on 5 March 2010, Frank Bannister (BESSO) and Tim Scorer (Ince & Co International Law Firm):
1. Advised the meeting of the AOPA Mentoring Scheme.
  2. Advised them that they can expect to receive requests from Brokers on behalf of Mentees and Aircraft Owners to :
    - a) Note that the aircraft they insure would be used for the AOPA Mentoring Scheme.

- b) They would be asked to agree a standard endorsement wording which added AOPA UK as an additional insured in respect of the scheme.

2.5 In the event that your aircraft insurance policy does not include the clause, or similar, as below, you should contact your insurance Broker or Underwriter, advising them that you wish to use your aircraft for Mentoring, based on the AOPA Mentoring Scheme, and would like to subrogate cover to all parties and have this clause added to your aircraft insurance:

"It is understood and agreed that the insured aircraft may be used for the purposes of Mentoring in line with the Aircraft Owners and Pilots' Association ("AOPA") Mentoring Scheme Framework.

It is hereby understood and agreed that this insurance is extended to cover [NAMED ORGANISATION IF NOT THE INSURED OR OWNER/OPERATOR] and the Mentor as additional Insured's under the Liability insurance hereon for their respective interests but only in respect of the coverage provided under this policy, and to include a waiver of subrogation in their favour in respect of hull insurance.

It is further understood and agreed that notwithstanding the inclusion herein of more than one Insured, the total liability of the Insurers in respect of any or all Insured's shall not exceed the limits of liability stated in this Policy.

In respect of the Mentor, it is understood and agreed that notwithstanding any exclusion specifically relating to pilots and operational crew in the Section of the policy covering the liability of the Insured to passengers, such coverage shall extend to include the liability of the Insured to the Mentor and his/her Dependents and Estate.

Subject otherwise to all the terms, conditions, exclusions and limitations of the policy."

2.6 Further advice given to AOPA leads to the following guidance:

- A pre-requisite for using any aircraft in the Scheme must be a careful consideration of the terms of the insurance policy issued in respect of that aircraft. Two particular areas of the cover provided must be carefully checked. These are: The pilots authorised to fly the aircraft and the permitted uses for the aircraft. The importance of these two areas cannot be understated. However compliance with all the terms and conditions of the aircraft policy is essential and continuous. The value of the cover obtained is dependent upon such compliance, without which the cover is worthless.
- It must be clear before every flight who is the Pilot in Command (PIC) for the whole flight. For flights conducted under this Mentoring Scheme Framework this will be the Mentee, to avoid any potential confusion and/or potential risk of loss of insurance cover.
- Responsibilities for aircraft operation rest in law on the Pilot in Command (PIC). It follows from this that both from the perspective of regulatory compliance, i.e. Air Navigation Order (ANO), insurance compliance (it is the PIC who must be insured under the policy), and legal liability (PIC is deemed to be the responsible party), the identity of the PIC is fundamental and crucial. The determination of who is PIC is not something which can be regarded as a moveable option. When a flight is checked out the PIC should be determined, and should be deemed to remain as then determined. After an accident it is unsatisfactory, especially and obviously after a fatal accident, to consider any other alternative.
- Compliance at all times with the ANO is essential and such a requirement overrides all other instructions, recommendations and advice given or promulgated as part of this Mentoring Scheme Framework. Unless there is imminent danger to life or limb, all flights must be conducted legally, both with respect to documentation, qualification, licensing and flight operation.
- No flight under this Mentoring Scheme Framework will be an Instructional flight. The Mentor must not give commands or instructions to the Mentee. It will be in the nature of the exercise that the less experienced and qualified pilot will be PIC, and therefore any interaction during a normal flight should be of the nature of a First Officer making suggestions to a Captain. In contrast, in an Instructional flight, the Instructor is always PIC, despite sitting in the RH seat. It is also an important consideration that the use of an aircraft for Instructional purposes is a separate USE for the purposes of the Insurance cover. Therefore, it is important and significant that flight for the purposes of this Mentoring Scheme Framework is never construed or considered as being an Instructional flight. This is important from the perspective of both insurance cover as well as the regulatory aspect.

2.6 If any other “club rules” apply, e.g. membership, currency, these shall be included as an addendum to the Mentoring Scheme Framework for local application.

### **3. Mentor and Mentee Requirements**

3.1 Under the Mentoring Scheme Framework, a Mentor must as a minimum have:

- 200 Hours P1
- A current PPL/CPL Licence valid for the type of aircraft to be used for mentoring
- A current medical
- Current Ratings for the type of aircraft to be used for mentoring and the flight conditions
- Current flying experience

Ideally, a mentor should be able to qualify for an AOPA Gold Wings Award level.

3.2 Under the Mentoring Scheme Framework, a Mentee must have:

- A current PPL/CPL Licence valid for the type of aircraft to be used for mentoring
- A current medical
- Current Ratings for the type of aircraft to be used for mentoring and the flight conditions
- Current flying experience

### **4. Administration**

4.1 This Mentoring Framework can be adopted by a Registered Facility, Authorised Training Organisation, other Flying Club or Group entity or an individual Pilot.

4.2 For other than an individual Pilot, a record of current Mentors approved by the Organisation should be maintained, together with any conditions to be applied to an individual Mentor.

4.3 For other than an individual Pilot, all Operational Staff, Instructors and/or Group Members should be made aware of the Scheme and where to find detail of current Mentors such that they may authorise mentored flights if required.

4.4 It is for individuals, organisations or Groups to determine how they will implement and promote the use of the Mentoring Scheme, including how Mentee and Mentor are brought together. AOPA UK members may be listed on the AOPA UK website, where brief details and an email contact form can be provided. Mentor locations can also be included on a map.

4.5 It is recommended that a simple means to record mentored flights and their objectives be implemented. Such record could be extended to include Mentee and Mentor feedback.

### **5. Guidelines for Mentors and Mentees**

5.1 Clear guidelines should be published for both Mentor and Mentee.

5.2 A sample set of guidelines is attached at Appendix A, which should be adapted for your own local use.

## 6. Supporting Schemes and Courses

6.1 If you are a Corporate Member of AOPA UK with training facilities or an Instructor member you may be interested in these AOPA courses:

- Aerobatics Rating Training Syllabus
- RADNAV Course (for those not immediately ready to train for an IMC/IR/R)
- Companions Course for the partner of the Pilot (which could lead to another Student)

Contact AOPA UK for more details.

# Appendix A; VFR Mentoring Guidelines

## 1. Purpose

1.1 The purpose of mentoring is to help less experienced pilots, as Mentees, to gain experience within their existing qualifications or refresh their experience, thus gain confidence to use their qualifications safely in earnest and to encourage them, if they wish, to move on to further qualifications, for example to the IR(R) rating and Radio Navigation Certificate, or move to more complex aircraft.

## 2. Example Flight Objectives

2.1 A typical example of a VFR mentoring flight could be a trip from a Midlands airfield to an airfield in France for lunch. This would require the Mentee to plan and execute the flight with appropriate guidance from the Mentor.

2.2 This type of flight would give the Mentee an opportunity to prepare for subsequent AOPA Wings Scheme achievements. The session would cover a review of the basic elements of aircraft control including, heading, height and speed control, trimming and engine management including correct leaning techniques, in all of which the Mentee will have been trained for the issue of his/her Pilot licence.

2.3 Pre-flight planning could typically cover:

- Review of Licence, Medical, Insurance, Aircraft Documents
- Weight and Balance and Performance calculations
- Review of sources for weather self briefing and interpretation of weather charts, METAR & TAF
- NOTAM, valid sources and how to check
- Flight planning, Fuel planning, PLOG, chart marking, reference points
- Responsibility for any passengers carried on the flight
- Selection of suitable alternate Aerodromes/Airfields
- Use of GPS and Radio Aids as an aid to VFR navigation
- Correct use of RT
- Preparation of message to transmit,
- Read back
- Gaining situational awareness from others' transmissions
- Requirements for overseas flight,
- Flight plans
- Customs & Immigration
- Special branch
- Where to locate appropriate forms
- Documentation
- Survival equipment
- Fuel Drawback
- Controlled airspace, penetration and avoidance
- Emergencies and system failures

o EFATO

- Engine Failure in the cruise
- Engine Fire
- Total Electrical Failure
- Radio Failure
- Unsure of position
- GPS Failure Modes
- Gear failure
- Control jamming
- Instrument failure

2.4 Other areas of skill development that could be considered depending on the Mentor and Mentee's current experience, for example:

- Farm Strip flying
- Performance
- PPR, briefing and inspection
- Approach and landing techniques including correct speed and attitude control
- Standard Overhead Join
- Noise footprint
- Flying into major airports
- Briefing and documentation
- RT Procedures and Controlled Airspace
- Fitting in with traffic
- Situational awareness
- Handling agents
- Wake turbulence
- Fuel availability

2.5 Prior to any Mentoring session, both the Mentor and Mentee must be current in their flying.

2.6 At a minimum, this means that both the Mentor and Mentee have logged three take offs and three landings in the last 90 days as PIC in the same class rating of the aircraft that is to be used for the mentoring session.

2.7 Additionally, the Mentee must have logged a flight as PIC, including a take-off and landing, in the last 6 weeks in same class rating of the aircraft to be used for the mentoring session. If the aircraft owner or operator has set a more stringent currency requirement than 6 weeks then this must apply. If a type rating is required for the aircraft to be used, then currency must be in that type.

2.8 Additionally, the Mentor must have logged a flight as PIC, including a take-off and landing, in the last 3 weeks in an aircraft of the same class rating, or alternative class rating of greater complexity, as that to be used for the mentoring session. It is desirable that the Mentor is more recently current than the Mentee.