

# **PTDI Annual Report**

## **Standards Compliance Checklist**

*Certification by the PTDI signifies that a course of study for the training of commercial motor vehicle (CMV) drivers has been evaluated and meets or exceeds the following criteria without exception.*

*To check yourself that you continue to adhere to all standards, please complete the following checklist. Study each standard carefully to be sure that you are documenting each portion of the standard; use the check boxes to guide you. The signature on the affidavit (Part VI) certifies that the school is addressing each item in the standards.*

### **Standard 1.1 – Truth in Advertising and Public Information**

Advertising statements and informational materials, including all

- printed material,
  - websites,
  - television and radio ads,
  - audiotapes, and
  - publications
- are clear, truthful, accurate and unambiguous in describing the school's driver training program.

### **Standard 1.2 – Organizational Framework**

The course is clearly administered through a defined organizational framework that has

- institutional support and
- with a staff who possess administrative qualifications.

### **Standard 1.3 – Course Goals**

- The course of instruction is guided by clearly stated objectives that match needs of students and the transportation industry.
- Objectives must
  - be industry specific to meet the job performance requirements of the industry and
  - clearly indicate the type of knowledge, skill and behavior students must demonstrate.

### **Standard 1.4 – Student Eligibility and Admissions**

- The school has clear, written eligibility course requirements and admissions policy that the school follows and provides to prospective students.
- Except as otherwise required by law, an applicant must meet the applicable minimum federal/state/provincial driver qualification requirements.

### **Standard 1.5 – Written Policies and Procedures**

- The school must utilize a written safety/accident prevention policy.
- Any liability of the school and/or students should be clearly defined and evidence of insurance coverage provided.

### **Standard 2.1 – Course Outline**

- A course outline clearly identifies units of instruction including their sequence, broad purpose, and general content.
- It is provided to all participants and is available to other interested parties.

### **Standard 2.2 – Course Content and Objectives Specifications**

- The course is composed of units of instruction that cover the knowledge and skills required to operate a commercial motor vehicle safely and properly.
- Units are designed around a combination of performance, knowledge and skill objectives, although not every unit necessarily will have some of each.
- The instructional sequence is structured to enable efficient teaching and learning.
- Performance* objectives specify what students can do at the conclusion of instruction and are linked directly to the PTDI Curriculum Standards.

- Knowledge* objectives describe what students know at the conclusion of instruction and are linked directly to the PTDI Curriculum Standards.
- Skill* objectives describe the level of performance students must master/demonstrate at the conclusion of instruction and are linked directly to the PTDI Curriculum Standards.

**Standard 2.3 – Print Materials**

Printed instructional materials:

- are appropriate to their intended use during instruction, or preparation for instruction
- fit conditions of use (e.g., classroom, on range, in vehicle, self study, distance education, externship)
- are appropriate to ability level of trainees
- are provided to each trainee
- contain up-to-date information.

**Standard 2.4 – Audio-Visual/Multimedia Materials/Simulation**

- Materials are up-to-date, appropriate, and fit into instructional sequence and lessons.
- Simulators, electronic multimedia and computer-assisted instruction activities may be used and count toward classroom/laboratory time.
- All such training materials must meet the requirements for curriculum materials outlined for classroom-based training in Standard 2.2 (Course Content and Objectives Specifications.)

**Standard 3.1 – Instructor Qualifications**

- Instructional personnel must be competent persons who by way of education, training and/or experience are knowledgeable of course content, and are capable of identifying specific course and/or administrative matters that could affect course quality. They must also have education and experience that qualify them for their assignments. The following elements are required:
  - Skill instructors, where commercial motor vehicle-driving competency is required, have a minimum of three (3) years experience as a licensed commercial motor vehicle driver with a driving record which meets state/provincial requirements, school policy/standards, and regulatory requirements.
  - Classroom instructors have documentation of instructional skills, such as formal training, in-service education or teaching experience.
  - Each instructor must have a state/provincial license and other permit, if applicable, and meet state/provincial requirements for a vocational instructor.

**Standard 3.2 – Instructor Staff Development and Supervision**

- Instructors must participate in an ongoing staff development program and activities, such as in-service training, membership and participation in trade and professional organizations, or other training activities designed to improve their teaching competencies.
- Also, to ensure high quality instruction, instructors are
  - carefully supervised and systematically evaluated at least annually with appropriate documentation.
  - Instructors who have been employed by the school for less than one year should be evaluated quarterly.

**Standard 4.1 – Training Vehicles**

- Vehicles are comparable in size and power to industry sector for which students are being trained.
- All highway vehicles are in good mechanical condition and comply with applicable federal/state/provincial safety requirements.

**Standard 5.1 – Classroom/Lab Instruction**

- Classroom/lab instruction is composed of units of instruction that cover the information required to operate a commercial motor vehicle safely.
- Instruction covers subject areas identified by the PTDI curriculum and skills standards including the performance criteria.

- Classroom/lab instruction is supported by appropriate visual and instructional aids such as slides, films, videotapes, electronic multimedia, displays, textbooks and written instructional materials, models, charts, mock-ups, simulators and computer-based instructional activities.

**Standard 5.2 – Instructional Time**

- Each student must receive a minimum of 148 hours (60-minute hours) or 178 hours (50-minute hours) of instruction.
  - This could be a combination of learning techniques such as classroom, lab, Computer-Based Training, and/or simulation, and must include range and highway driving.
- Classroom and lab time must be a minimum of 104 hours (60-minute hours) or 125 (50-minute hours).
  - Classroom/lab and skills training must include each component outlined in the Curriculum Standards Units of Instruction as found in “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Behind-the-wheel instruction must be a minimum of 44 hours (60-minute hours) or 53 hours (50-minute hours) per student and completed as follows:
  - Highway instruction must include a minimum of 12 hours including six hours with a 15,000 pound load.
  - The remaining 32 hours may be range, highway or a combination of range and highway.
  - One hour must include night driving principles.
  - Classroom/lab and skills training must include each component outlined in the Curriculum Standards Units of Instruction as found in “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- If the student to vehicle ratio exceeds 1 to 1 (1:1), see “Curriculum Standards and Guidelines for Entry Level Commercial Motor Vehicle Driver Courses” for appropriate time conversion.

**Standard 5.3 – Student/Instructor/Vehicle Ratio**

- Student/instructor ratio during group instruction such as classroom and/or lab must average one instructor for not more than each group of 30 students (1:30) over the year and never exceeds one instructor per 36 students.
- Range driving ratios must be a minimum of one (1) instructor for 3 vehicles (1:3) and one (1) instructor per 12 trainees (1:12).
  - A waiver may apply for student proficiency development/practice provided that Standard 5.7 is met (see Standard 9.4 Variance Option).
- Highway driving ratios must be one (1) instructor per one (1) vehicle (1:1) and a maximum of 4 trainees per vehicle.

**Standard 5.4 – Lesson Plans**

- The course must have written daily lesson plans for
  - classroom, lab,
  - range and
  - highway,
- and instructors comply with the daily lesson plans to ensure quality, consistency, and uniformity of instruction.
- These outlines or plans are used to guide each session.
- They should include:
  - content
  - key points
  - objectives
  - frequent evaluation activities
  - trainee practice or use of information

**Standard 5.5 – Classroom Conditions**

- The learning environment is safe, sanitary, and comfortable, with adequate furnishings, light, temperature, ventilation, and space.

**Standard 5.6 – Range Conditions**

- Range instruction is provided on a safe, controlled driving range or yard where trainees can operate a commercial motor vehicle without exposure to hazards from other highway users.
- The driving range is free of obstruction and the surface enables novice drivers to maneuver safely and free from interference from other vehicles that may also be operating on the range.
- Adequate sight lines and lighting are available to instructors and trainees.

**Standard 5.7 – Highway Instruction Conditions**

- Behind-the-wheel (BTW) instruction is conducted under various highway and traffic conditions that satisfy the PTDI skill and curriculum standards objectives and will demonstrate that the student can operate the vehicle safely.

**Standard 5.8 – Length of Day**

- The total time for a typical instructional day must not exceed ten (10) hours average, including direct contact instructional hours, and independent study, if used.
- More than six (6) consecutive days of training using the 10-hour rule is discouraged.

**Standard 6.1 – Classroom/Lab Tests**

- Knowledge and skills performance and assessment criteria are outlined in the “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Each student must be evaluated for each unit of instruction in skills and knowledge as outlined in the “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Tests and/or performance assessments are used to test each student’s knowledge and/or skills for each unit of instruction.
- Test questions are phrased with sufficient clarity to avoid confusing students.

**Standard 6.2 – Range Tests**

- Knowledge and skills performance and assessment criteria are outlined in “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Each student is evaluated in skills performance as outlined in the “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Range tests assess a student’s proficiency of the fundamental vehicle control skills and routine driving procedures.

**Standard 6.3 – Road Tests**

- Knowledge and skills performance and assessment criteria are outlined in “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.” Road, street or highway tests assess the student’s attainment of objectives of this part of the training.
- Each student is evaluated in skills performance as outlined in the “Skill Standards for Entry-Level Commercial Motor Vehicle Drivers” and the “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”
- Routes are conducted in traffic and permit a broad range of observation, and the results are recorded on an examination checklist.
- The routes to be used are pre-planned to provide as comprehensive a test of the student’s driving skill as possible in the geographic area in which the school is located.

- Student proficiency tests (BTW) are administered in a vehicle which is comparable in size and power to the industry sector for which students are being trained.
- If students are being trained for or by a specific employer, the employer's requirements supersede this standard.

**Standard 6.4 – Graduation**

- Graduation criteria include successful completion of a course of instruction that meets the PTDI curriculum standards and hours, and includes appropriate subject matter tests and road skill tests. As a condition of graduating, each student must obtain his/her CDL.
- Eighty-five percent (85%) of students graduating from a PTDI course must meet all the PTDI standards within two (2) times the length of the course (in numbers of business days) or two (2) times the length of wait periods (i.e., the actual time between making an appointment for a test and the test date) between test times, whichever time period is longer.

**Standard 7.1 – Follow-up**

- A follow-up system is used to determine:
  - student employment
  - program effectiveness
  - CDL pass rates
  - placement rates
  - course failure rates

**Standard 8.1 – In-Training File**

- An "in-training" file is maintained for each student.
- The file must contain the student's
  - training records,
  - attendance/time records,
  - test results,
  - unit completion,
  - progress information such as achievement of objectives record,
  - behind-the-wheel time records and
  - such other documents that are required by federal/state/provincial law.
- The files must be up-to-date and secure.

**Standard 8.2 – Student Records**

- Complete records of graduates are kept as required by their state/province or for a minimum of five (5) years.
- Permanent records are kept as required by their state/province or for a minimum of five years.
- A permanent student record includes, at a minimum,
  - records of admission
  - documentation that the student meets the admissions requirements
  - records of attendance (dates of entry and departure)
  - records of training time
  - program of study including clock/credit hours and grades
  - performance, status and completion date
  - copies of PTDI certificate or graduation certificate with PTDI seal
- Records are provided to PTDI upon request.
- Records are securely maintained.

**Standard 8.3 – Behind-the-Wheel Time Records**

- Each student (including students participating in an externship program) keeps a “driver duty status record” or other appropriate documentation of the student’s behind-the-wheel time that is recorded in such a way as to be:
  - clear and unambiguous
  - signed by the student and also
  - signed or initialed by the instructor
  - acknowledged by the student if any corrections are made
  - easily understood for audit purposes
- Verification of the correctness of the record/document would include:
  - Start/stop time
  - BTW time
  - Range/highway time
  - Night driving
  - Weighted trailer time
  - Time totals

**Standard 9.1 – Independent Study**

- Independent study is an alternative method of guiding student learning in addition to traditional classroom instruction and must meet the same objectives with regard to content, time on task and mastery of material. It requires independent consideration and mastery of a designated body of knowledge and is, therefore, differentiated from homework, which merely reinforces materials covered in class. Independent study should include the following key elements for each unit:
  - Number and title of PTDI curriculum classroom unit for which it is proposed independent study be substituted; e.g., Unit 1, Unit 2 (See Curriculum Standard Units of Instruction in “Curriculum Standards and Guidelines for Entry-Level Commercial Motor Vehicle Driver Courses.”)
  - Classroom hours required for that unit, including both classroom contact hours and independent study
  - Total number of hours being submitted with independent study
  - Performance objectives
  - Knowledge objectives
  - Independent study materials to be used
  - Estimated time to complete independent study materials
  - Procedure used to determine whether the student did in fact achieve the objectives
  - Evaluation instruments and other documentation indicating successful completion of independent study
- Thirty-four (34) (41) hours of independent study may be utilized for classroom/lab instruction, subject to a minimum of 70 (84) hours actual classroom/lab instructions, in order to meet the required 104 (125) hours of classroom/lab time. Courses must explain how the option is used and complete and file the time waiver form. (See Appendix C of these standards.)
- If independent study is used it should be cited in the school catalog, brochures, and other documents where it is legal to do so.

**Standard 9.2 – Distance Learning Option**

- All PTDI enrollment standards as outlined in Standard 1.4 (Student Eligibility and Admissions) are applicable.
- Distance learning is defined as: educational or instructional activity that is delivered electronically to students. This could include interactive instructional models such as audio or video computer conferencing, or Internet/Web-based instruction. The use of home-based learning using only a workbook as a study guide is not acceptable.
- The core curriculum in distance learning must be the same or comparable to the curriculum in the on-campus program.
- The course provides for timely interaction between instructor and student.
- The course being offered electronically must be the equivalent of all hours of credit as required for classroom/lab time in PTDI Standard 5.2 (Instructional Time).

- The school must verify appropriate training and support services to instructors who teach courses and programs electronically as outlined in Standard 3.2 (Instructor Development). Training must be documented and placed in the instructor file.
- Prospective students in distance education programs must be provided with information regarding admission; skills needed to participate; equipment requirements; academic support services available; course and program completion requirements; and any additional costs for distance learning programming as outlined in Standard 1.1 (Truth in Advertising & Public Information).
- Each student must take a proctored exam at a certified location offered by the school. Documentation of identity, date and time, location of the test and test scores must be signed by the appropriate administrator and placed in the student file.
- Courses begin and end within a specified or controlled time frame and require that the assignments and tests be submitted by specific due dates. Students must be able to review completed lessons as part of the course offered prior to any proctored exam.

**Standard 9.3 – Externship Option**

- An externship program should contain the following elements:
  - weekly student evaluation
  - objectives that specify and direct training
  - skilled and experienced driver-trainers to teach and monitor training
  - quality training materials
  - a curriculum that describes the elements of training that the CMV trainee will experience
  - performance assessment of critical skills
  - a system of feedback and record keeping for the CMV trainee, both for the trainee and the school
  - clearly articulated program policies on issues such as attendance, pay, insurance, and liability
  - a formal agreement between the carrier and the training institution
- The Externship Option allows a training course to defer up to 14 hours (60-minute hours) or 17 (50-minute hours) of the 44 hours (60-minute hours) or 53 (50-minute hours) behind-the-wheel training of any individual to a trucking firm.
- Of the total behind-the-wheel hours, 30 hours (60-minute hours) or 36 (50-minute hours) must be conducted during the school/residence part of the program.
- In externship designs, time equivalents indicate that three (3) hours of instruction in-the-CMV equals one (1) hour of Professional Truck Driver Institute-certified course instruction conducted at the school.
- This standard is evaluated against the Externship Criteria Validation Checklist, Appendix D.

**Standard 9.4 – Variance Option**

- The variance option allows a school to apply for a variance of a specific standard that cannot be met in a conventional manner.
- The school may propose an alternative method of compliance other than described in the PTDI certification Standards.
- Each request must address a specific standard and will not be given in blanket form for a group of standards.
- Final determination of a request will rest with the Certification Commission.
- Requests for variance of a standard are not subject to appeal.
- Requests for variance are to be made prior to the team visit in order to avoid unnecessary delay in the process or misunderstanding during the on-site visit at the school.