



Occupational Level Training –
Commercial Transport Truck Operator
Program Development Guide



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BACKGROUND

THRC publishes a National Occupational Standard for Commercial Transport Truck Operators (NOS-O) which defines the knowledge, skills, and abilities ("competencies") required for this occupation.

This document is a supplemental resource to the NOS-O. For the full suite of supplemental resources, visit **truckinghr.com**.

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TABLE OF CONTENTS

Purpose of this Guide	1
Who can use this Guide	1
How to use this Guide	1
Limitations of this Guide	1
Introduction to Occupational Level Training	2
Commercial Transport Truck Driver – Training Stages	3
Creating the Program Structure	3
Insurance and OLT Programs	4
Determining Program Participants	4
Proposed Program Topic Areas	6
Designating Instructors, Trainers, Mentors, Coaches, and Evaluators	8
Instructor (also referred to as Trainer)	8
Mentor (also referred to as a Coach)	8
Assessor (also referred to as an Evaluator)	9
Preparing, Training and Monitoring	9
Learner-to-Instructor Ratios	10
Checkpoints	11
Program Duration	12
Program Review and Evaluation	12
Appendix A: Program Development Worksheet	13



PURPOSE OF THIS GUIDE

This guide can help you create **Occupation Level Training** (also known as driver finishing) that will meet the needs of your company. If your company has an existing program, refer to the *Program Review Guide* to help you determine if the drivers completing your program meet the National Occupational Standard for Commercial Transport Truck Operators (NOS-O).

WHO SHOULD USE THIS GUIDE

This Guide is designed to be used by staff who are responsible for **human resources, training, safety, compliance, recruiting,** and **operations** at their companies.

HOW TO USE THIS GUIDE

Read through each of the document's sections to determine how you could structure an OLT program, then use the Program Development Worksheet (*Appendix A*) to capture how you would structure your program e.g. topics taught, resources required etc. Visit the links to over a dozen resources you can use during program planning, set up, and delivery.

If you have questions or are interested in more information, contact THRC at info@truckinghr.com



INTRODUCTION TO OCCUPATIONAL LEVEL TRAINING

Occupational level training (OLT) is often referred to as “driver finishing” – it is part of the training that allows individuals to acquire the competencies outlined in the National Occupational Standard for Commercial Transport Truck Operators (NOS-O).

Trucking HR Canada (THRC) published a National Occupational Standard for Commercial Transport Truck Operators (NOS-O). The NOS defines the knowledge, skill, and ability (“competencies”) required for this occupation. To download your copy, visit truckinghr.com.

Such programs exist at trucking companies across the trucking and logistics industry. In OLT, commercial transport truck operators develop their driving skills and knowledge and improve their proficiency while completing many different occupational tasks. They also learn about workplace requirements, policies, and routines, and develop familiarity with handling cargo, dealing with shippers and receivers, and operating various types of vehicles.

Many OLT programs are similar, but they often vary in scope, duration, and structure to serve the unique needs of each workplace and the varying degrees of commercial transport truck operator responsibility. Differences in operating demands, goods carried, routes, company objectives, and availability of resources require each workplace to deliver OLT in a unique manner.

THRC has produced this Guide to help companies structure an OLT program to meet their unique needs.



COMMERCIAL TRANSPORT TRUCK DRIVER TRAINING STAGES

Success in the commercial transport truck operator occupation requires individuals to acquire a unique set of competencies, usually in two major stages.

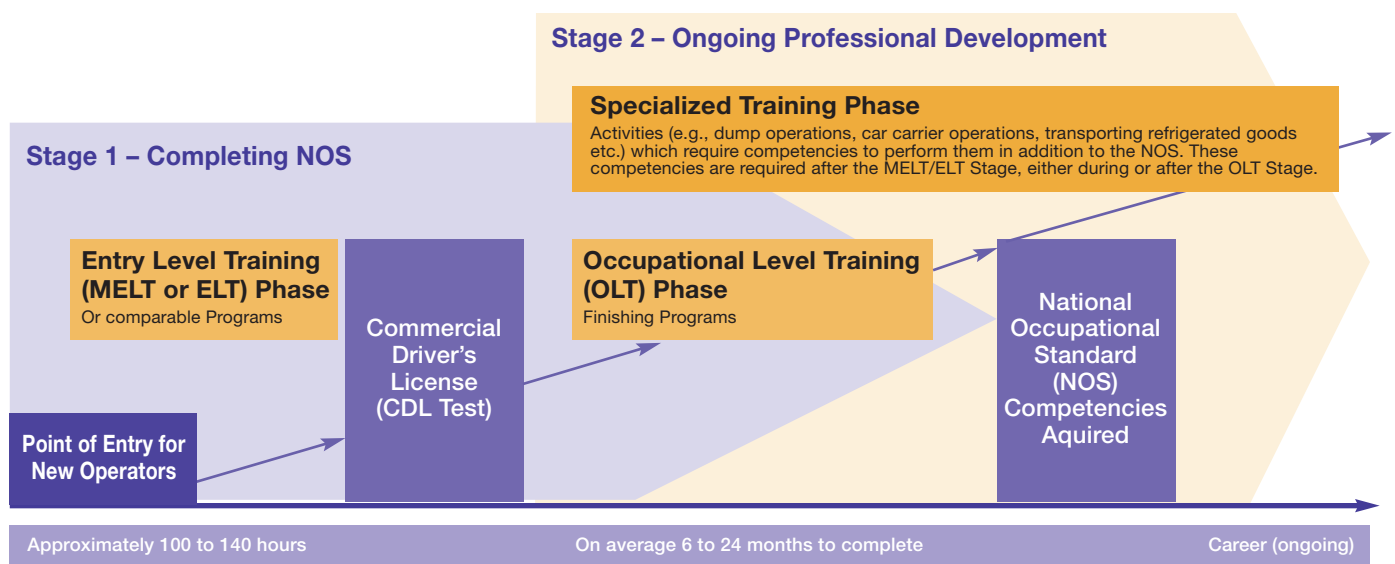
During Stage 1, commercial transport truck operators work to obtain all the competencies outlined in the National Occupational Standards (NOS-O) in two phases:

- **Entry-Level Training (MELT/ ELT) Phase:** In this phase an individual begins acquiring enough of the NOS-O competencies to obtain a commercial driver licence (CDL) and to begin working as a commercial transport truck operator.
- **Occupational Level Training (OLT) Phase:** In this phase, an individual applies NOS-O competencies in real-life situations while working as a commercial transport truck operator to fully acquire those competencies. This phase of competency development is often referred to as “driver finishing” and takes place after the ELT phase.

These two phases are generally detached from one another, but in some jurisdictions the training is combined and administered through a single program. Where the phases are separate, traditional truck driving schools almost exclusively deliver the first phase, while workplaces offer the second.

Stage 2 extends through the entire length of a commercial transport truck operator's career. During this stage, operators develop professionally above and beyond the competencies outlined in the NOS-O and often acquire supplementary knowledge relating to various commodities, operation settings, routes, etc.

Commercial Transport Truck Operator – Training Stages



CREATING THE PROGRAM STRUCTURE

OLT programs are generally full time with a mix of classroom, in-yard, and on-road training activities that change from program enrolment to graduation.

Jurisdictional requirements may influence the program structure, especially in an integrated ELT and OLT program. You may also be required to adhere to learner-to-instructor ratios, learning environments, and minimum teaching times.

An OLT program structure can be rigid or flexible: a flexible approach may support each operator's unique pace of development, while a rigid structure at the beginning, transitioning to a flexible structure later may help you use resources efficiently.

Work through this document to help your company establish an OLT program structure that fits your needs.

Program Development Worksheet (*Appendix A*) will help you capture the structure that is right for you.

INSURANCE AND OLT PROGRAMS

Consider the insurance implications and opportunities related to creating an OLT program.

Bring your insurance provider or agent in early when considering whether an OLT program is viable for your company. They can provide valuable support and expertise while you develop your programs, as well as any necessary insurance coverage changes you might need.

Companies that don't offer this type of training may not have insurance coverage for commercial transport truck operators without adequate experience. Talk to your insurance provider to ensure that the training you have planned will cover operators throughout your program and following graduation.

DETERMINING PROGRAM PARTICIPANTS

The types of participants that you accept into your OLT program will help to determine the types of content taught, length of the training, training pathway(s), and training methods. To determine your program's participants, consider the following:

- What do your operators need to know to be able to do their job? For example, what cargo is being transported, what distances do they travel, what responsibilities do they have in addition to driving, etc.



- What types of commercial transport truck operator applicants are you likely to get? There may be a mix of:
 - New graduates from a school ELT or MELT program.
 - Persons already employed at the company.
 - New operators who have some driving experience since leaving a school ELT or MELT program.
- What resources (e.g., money, time, equipment etc.) is your company willing to allocate to the program?

The goal of any OLT program is to meet a new operator applicant where they are and provide them with the knowledge and practical **expertise** they need to be competent as a commercial transport truck operator for your company. Your company can however set entry level parameters – the knowledge and abilities an operator requires to enter the program.



PROPOSED PROGRAM TOPIC AREAS

Your company will need to decide what topics to teach, how long each topic area will be taught, and how each topic area will be taught. These decisions include theory and practical instruction, use of mentors, time in the yard, and driving time, all of which must be determined.

OLT programs generally follow the same topics and learning environment structure as in ELT, which covers the following:

Topics (taught in the classroom, in-yard, and on-road):

- Working in the Industry
- Vehicle Components and Systems
- Basic Driving Techniques
- Professional Driving Habits
- Tractor-Trailer Off-Road Tasks and Maneuvers
- Documents, Paperwork, and Regulatory Requirements
- Vehicle Inspection Activities
- Hours of Service Compliance
- Cargo Securement and Loss Prevention
- Handling Emergencies

Tasks (taught in-yard and on-road):

- Vehicle inspection
- Coupling/uncoupling
- Backing, docking, parking
- On-road driving



You may also choose to add other topics to your OLT program to meet specific company needs such as transportation of dangerous goods, workplace hazardous material information system, hazard and incident response, border crossing, food handling, and company policies and procedures.

National Occupational Standard – Commercial Transport Truck Operator Supplements

As operators develop professionally above and beyond the competencies outlined in the NOS-O, they often acquire additional knowledge and skills related to various commodities, operation settings, routes, etc. THRC has developed documents to outline the additional competencies required of drivers for:

- Driving Steep Inclines
- Flatbed Operations

Once you have determined the topic areas you plan to cover, to deliver the content you may decide to access or purchase existing curriculum and training resources from established material providers, related companies, insurance providers, or consultants. Or, your company may also decide to create a customized curriculum.

The following NOS-O supplement documents can be used to help you develop curriculum and/or evaluate established materials:

- **Occupational Level Training – Knowledge Content Inventory:** This document lists knowledge-based learning outcomes you should ensure are addressed in your OLT training curriculum. Many will have been covered during the ELT training phase and should only require learning validation. Some however may need to be reinforced, while others require on-the-job experience to be fully acquired.
- **Occupational Level Training – Practical Content Inventory:** This document lists the practical learning outcomes you should ensure are addressed in your OLT training curriculum. Many will have been covered during the ELT training phase and as part of the CDL test, however skill levels are likely to vary. Performing tasks and practical evaluation is the best way to validate learning and acquire practical competencies. Many practical learning outcomes require on-the-job experience and repetition to be fully acquired.

THRC has developed a suite of Training Guides with information, tools, and templates that can also help you with your OLT program development.

Access the following topic areas:

- Vehicle Inspection
- Tractor-trailer Coupling and Uncoupling
- Tractor-trailer Backing
- On-road Driving



DESIGNATING INSTRUCTORS, TRAINERS, MENTORS, COACHES, AND EVALUATORS

Companies use many different types of individuals in different roles to deliver OLT.

The following information and THRC resources can help you to determine what individuals you will need in which roles for your program and how you can ensure they are a good fit.

Instructor (also referred to as Trainer)

Initial OLT program delivery consists of traditional one-on-one activities (e.g., driver and instructor in the same vehicle), where there is a defined learner/trainer relationship. The instructor role tends to evolve as OLT delivery progresses: the instructor may become more of a mentor or coach later in OLT delivery.

Mentor (also referred to as a Coach)

Initial OLT program delivery consists of traditional one-on-one activities (e.g., driver and instructor in the same vehicle), where there is a defined learner/trainer relationship. The instructor role tends to evolve as OLT delivery progresses: the instructor may become more of a mentor or coach later in OLT delivery.

Types of Mentoring

Mentoring within an OLT program can be deployed in several ways once mentors have been identified and equipped to fulfil the role.

- **Formal Mentoring**

Formal mentoring involves specific objectives, timelines, activities, and metrics. The duration of formal mentoring can be short or long and should involve a manager who confirms plans are being followed, and goals are being achieved. Meetings between mentors and mentees generally follow a schedule.

- **Informal Mentoring**

Informal mentoring may also involve objectives, timelines, activities, and metrics, but is based on a “just-in-time” approach, where the learner takes responsibility for self-directed learning. Meetings between mentors and mentees occur as needed following a process for contacting each other. Informal mentoring may not tie as well to formal OLT program objectives and may not provide metrics.

- **Flash Mentoring**

Formal and informal mentoring suggest longer periods of contact with a mentee. Flash mentoring allows a mentee who is looking for specific information or help with a topic or task to reach out to short-term mentors for one or two sessions.

This approach requires a workplace to identify mentors with specialized or advanced knowledge on various workplace related tasks, who also have the ability and desire to assist others. This approach requires a culture that encourages mentees to feel confident about seeking assistance.

You may choose to start with formal mentoring and transition to informal mentoring. This may offer good results in an OLT program, provided the roles are defined and the transition is understood.

Assessor (also referred to as an Evaluator)

Conducting road tests and assessing a participant's knowledge and skills are part of OLT delivery. In OLT programs often this role is taken on by the instructor and mentor.

To help you develop criteria for selecting individuals for the roles of instructor, mentor, and assessor, THRC has developed the following resource:

- **National Occupational Standard for Commercial Transport Truck Instructor**

Defines the knowledge, skills, and abilities (competencies) that are needed to be a commercial transport truck instructor, mentor, and assessor.

Preparing, Training and Monitoring

Think about how you will develop and support the individuals who will be guiding OLT program participants. Experience is critical for all these roles, but experience alone does not equip a person to be effective.

Unlike an instructor at a driving school or company delivering ELT, OLT instructors, mentors and assessors are generally not subject to certification or qualification requirements.

Providing them with training and evaluating their effectiveness at regular intervals will help to ensure that you have the right staffing with the right skills in place.



For support training and assessing instructors, mentors and assessors consider using the following resources:

- **Instructor Curriculum Framework:** Provides a framework for developing training curriculum for commercial transport truck instructors.
- **Assessment Guide for Commercial Transport Truck Instructor:** Provides methods for assessing driving instructors, mentors, and assessors.

LEARNER-TO-INSTRUCTOR RATIOS

Learning is most effective when learners engage with the content delivered by the instructor or presenter. Different learning topics, and the complexity of those topics, requires different levels of engagement.

ELT standards include learning ratio requirements for different training activities. While these ratios do not apply to OLT, they are a helpful reference.

The following guidelines are suggested for OLT programs.

Activity	Learner:Instructor Ratio
Safety meeting, presentation, or information update relating to policy, procedure, requirements, regulatory changes, etc.	Unlimited
Classroom delivery of core theoretical occupational content.	15:1
Practical demonstration of procedural steps or process that does not involve application by the learner.	10:1
Practical demonstration of procedural steps or process requiring application and/or practice by the learner.	8:1
Demonstration/practice of core occupational tasks.	4:1 Four additional observers permitted
In-cab on-road driving	1:1 Two observers permitted; seat(s) required

CHECKPOINTS

To confirm that drivers are progressing and learning the required material, three checkpoints are recommended: when entering the program, an interim checkpoint, and at graduation.

The time between checkpoints will vary widely, as will the activities taking place between them, depending on the needs of your drivers.

1. Entry Checkpoint

Initial OLT program delivery consists of traditional one-on-one activities (e.g., driver and instructor in the same vehicle), where there is a defined learner/trainer relationship. The instructor role tends to evolve as OLT delivery progresses: the instructor may become more of a mentor or coach later in OLT delivery.

This checkpoint typically includes:

- Knowledge Test
- Practical Test
 - Vehicle Inspection
 - Coupling/uncoupling
 - Backing, docking, parking
 - On-road driving
- Verification of ELT/MELT training
- Background checks
- Employment history checks

Assess commercial transport truck operators when they enroll so you know the starting points. Your company will also want to ensure that the program's structure allows each participant to successfully graduate. Consider how training can be flexible so it can meet the needs of each participant.

Entry assessments can also help you identify where operators applying to your company got their training (e.g., ELT) — it should be at an acceptable level for your company. ELT programs are structured differently: some are more comprehensive than others. Over time, your company may find that you prefer to hire from some schools versus others, or you may have a better understanding of the needs of students coming from one school versus another.



2. Interim Checkpoint

A natural opportunity for an interim checkpoint is when direct instruction ends, and solo driving begins. It's an ideal opportunity to review knowledge and road tests and may include a review of previous evaluations from the initial training period.

You may also choose a different opportunity to check learning progress.

3. Graduation Checkpoint

This checkpoint should demonstrate that an operator is fully competent as defined in the NOS-O. Competency at graduation is validated again by a knowledge and practical test (as defined above).

Tools to Support Checkpoints

THRC has developed tools to help you evaluate your operators at each checkpoint:

- **Knowledge Evaluation Test Bank:** Provides a suite of questions used to assess operators. Use them to create knowledge tests of various lengths, duration, and difficulty.
- **Driving Assessment Guide:** Provides methods for conducting skill assessments of operators for the tasks of vehicle inspection, coupling/uncoupling, backing, and for on-road driving.

PROGRAM DURATION

OLT program duration varies, with most established programs running 6 to 24 weeks.

Assess your operational needs and opportunities to establish an initial program duration parameter, then evaluate the progress of new operator development and performance to determine if more or less time is needed. Compare your program with similar workplaces to help guide the initial program duration.

PROGRAM REVIEW AND EVALUATION

Periodically evaluate your OLT program to help determine what is or isn't working. Use entry, interim, and graduation assessments and a consistent format to review results to get clear metrics for tracking OLT program activities. These metrics, along with direct reviews with operators, instructors, mentors, supervisors, and OLT program administrators help you identify program strengths and weaknesses, and identify ways to measure the effects of program adjustments.



APPENDIX A: PROGRAM DEVELOPMENT WORKSHEET

Use this document to plan and establish an OLT program.

Program Features

1) What company resources are needed to deliver the OLT program.

Staff/department/consultant (etc.) developing the program:

Staff/department managing the program:

Staff/instructors/mentors involved in the program:

Areas required (e.g., training classroom, yard etc.):

Vehicles needed:

Are additional resources and/or materials required?

2) Does your company's insurance provide coverage for training?

3) Will insurance cover operators following their completion of your OLT program?

4) Who will be enrolled in the OLT program?

- a. Person who is enrolled in a longer entry level program that incorporates our finishing program.
- b. Graduate from a **basic** ELT or MELT program at a school.
- c. Graduate from an **advanced** or **extended** ELT or MELT program.
- d. Person who is already employed at our company.
- e. Person recruited directly from a school program.
- f. Person who has gained driving experience since leaving a school program.
- g. Other _____

5) What is the overall OLT program duration? (Hours, days, weeks etc.)

6) What topics will be included and for how long?

Topic	Theory	In yard (4:1)	In yard (1:1)	On-road (1:1)
Employment In the Commercial Vehicle Industry				
Vehicle Components and Systems Basic Driving Techniques				
Professional Driving Habits				
Tractor-Trailer Off-Road Tasks and Maneuvers – Backing				
Tractor-Trailer Off-Road Tasks and Maneuvers – Coupling/Uncoupling				
Documents, Paperwork, and Regulatory Requirements				
Vehicle Inspection Activities				
Hours of Service Compliance				
Cargo Securement and Loss Prevention				
Handling Emergencies				
Air Brake Systems				
Other. Please specify _____				



7) Who will instruct theoretical content?

8) List the instructor’s resources (e.g., manuals, lesson plans, learner resources). What resources does the company already have? What resources need to be developed?

Topic	Title	Has Access To	Needs Developing
Instructor manual			
Slides			
Textbook			
Handout			
Checklist			
Assessment/evaluation form			
Review/quiz			
Other:			

9) How much time will new drivers spend in-cab one-on-one with a senior driver?

	Hours		Days		Weeks
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10) Who will support trainees in-cab?





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