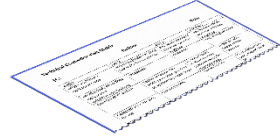


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Art byline: Lisa Turner

Hed: The Technical Counselor Visit: Setting Expectations

Byline: Lisa Turner

Excerpt: “Structuring your visits from that first call can help you and your builder navigate the complex landscape of what to work on, what questions to ask, and in what order to approach topics.”

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In the kick-off last month of this series for technical counselors we talked about structuring your builder visits using clear objectives. Next we’ll talk about what you should address with the builder before diving into the technical topics. These include expectations, project familiarization, planning and goal setting, workshop set-up, and the builder’s log.

## Expectations

**The Technical Counselor Program.** How much does the builder know about the technical counselor program? This is the time to explain that the program has two primary purpose and two ancillary purposes.

Primary goals:

- Increase safety by improving the mechanical reliability of the amateur built aircraft
- Promote the building and restoration of aircraft by making the process easier for amateurs

Side benefits include:

- Having a technical counselor make multiple visits to the project may help the builder obtain liability and/or hull insurance on the aircraft they built
- A considered and thoughtful build will lead in to a considered and thoughtful flight-testing program, and the TC can help the builder identify a flight advisor (“FA”) if they (the TC) is not already a FA.

**What is the builder looking for?** Here’s where you should take the time to listen carefully to the builder and what they expect, and want, from you. Take some notes, and make sure the builder has the opportunity to discuss everything they are concerned about.

**Explain EAA resources.** Bring EAA brochures and discuss the amazing array of resources that the EAA has to offer the builder. This may be the first time that the builder gets exposure to the

EAA. If you've got your laptop or tablet with you, bring up the many how-to videos that the site has.

**Familiarization.** You should spend some time on this first visit to become familiar with the project and the workspace. Review the aircraft type and any documentation that came with it.

**Planning and Goal Setting.** Every time you visit you should review this important component. As a TC, I've found that most builders are so excited, they launch straight in to their project and don't take the time to think about timelines and planning. I remember beginning my own first project and unpacking the boxes – I wanted to get going immediately. I had to calm myself down and think a bit before I felt organized. Help your builder do this if he or she hasn't done it already.

- Talk about a schedule and then write it down. Explain that it's not a deadline. The dates are going to move along with the project and that's ok. The important thing is to be flexible yet dedicated.
- Chunk the big pieces into smaller pieces and then those pieces into smaller tasks. Suggest that the builder allow more time than they think they will need for each phase. It's so much better to finish something small and feel good about it than to agonize over something big that you can't get your arms around.
- Help the builder be realistic on timing, and prompt them to set up a calendar planner to work from, or an app.

**Workshop Setup and Safety.** Review the build space. This is so individualized and personal, you'll need to use your own good judgment. The organization of parts is important and can save the builder a lot of time, so start with storage solutions like racks, shelves, and drawers. Labeling is critical, and can save errors that bite the builder later. If possible, use wall space all the way to the ceiling and use a step stool to access items. Similarly, check tool storage and labeling.

Everything you look at should prompt a safety review. Does the builder understand when they should be wearing goggles, hearing protection, and lung/airway protection? Is there ventilation in the area? How will the builder use devices to hang the engine and move heavy components? Discuss back safety, hoist and ladder safety, and look for trip and fall opportunities. Just bringing these items to the builder's attention will prompt them to be thinking about it.

**Start the Builder's Log.** The first visit is the time to talk about how the builder will document the build and create a Pilot Operating Handbook (POH) if a template is not supplied in the kit. Once again, I've found that most builders skip this step and dive into the build. It's easy to do, thinking, "I'll get to that later."

Introduce the EAA's builder's log app on the EAA website. <https://eaabuilderslog.org/?blhome>  
There's a webinar on how to use the log if the builder needs some hands on to use it.  
<https://eaa.org/Videos/Webinars/Aircraft-Building/6089409023001>

To get started, review what came with the kit, and determine what format best suits the builder's preferences. Explain that the documentation is also required when the FAA inspector or DAR arrives; they will want to see that the builder really built the airplane. The builder should also be

taking plenty of pictures – far more than they think they will need. Rather than using a phone, I suggest using a point and shoot camera and a tripod. Use a timer to take plenty of photos that include the builder in them. With a large memory card installed it will be easy to save and store the digital records.

For an in-depth guide to builder logs, see “What Should be in Your Builder’s Log” in the December, 2019 issue of Sport Aviation.

This first visit really sets the stage for a successful build and a happy builder. Given that kit aircraft completion rates are less than 40%, everything that you can do for your builder will make a difference.