



# Instructor-Led Session Student Packet

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# Study Guide

This short study guide contains the key points from the WITPAC self-directed online course. You may print it to use as a reference during your prep exam. Copies will be made available for you to use during your instructor-led session and knowledge exam, or you can bring your own.

## »»» Introduction

### Understanding the hazards



#### Blades

- Blades tend to be long and tall, and they are often wide.
- Their light color makes them hard to see under certain conditions. They should have tip socks to improve visibility.
- Blades are extremely flexible. On bumpy roads, they may flex enough to hit a vehicle that is following too closely.



#### Towers

- Tower sections are typically overheight, overlength, and overweight, and they also have low ground clearance.
- Larger tower sections are usually hauled on Schnabel trailers. A Schnabel is a two-piece trailer that hooks onto either end of the tower section.
- Schnabel trailers can be lowered and raised if needed to accommodate certain terrain.



#### Other large components

- These include things like machine heads (also called nacelles), hubs, and drivetrains. Typically, they are overwide and/or overweight.

# Module 1: Team fundamentals

## The basics of good teamwork



The transport driver is the leader of the team, but every member of the team should feel free to speak up, ask questions, and tell the rest of the team if they see something wrong. Any member of the team should call the carrier or other authority if they think that another team member has made a decision that puts the team at risk.

## Required safety procedures

### Exiting your vehicle

Whenever you exit your vehicle (even if you will not be in a crush zone), follow this steps.



Think ahead



Wear proper PPE



Carry a working two-way handheld communication device (radio)



Use Call-Response-Confirmation to communicate with your team

### Crush zones

A “crush zone” is any place around the trailer or load where a person could be crushed or struck.

### Mandatory crush zone safety procedures

Whenever someone will be in a crush zone, you must:



Chock the trailer wheels



Use visual indicators such as cones to remind the driver that someone is in the crush zone

## Additional crush zone safety procedures to use when feasible

### Lockout

When it is feasible, it is best practice to implement lockout procedures when someone is working near the trailer. Here are the steps:



Power down the engine, or use an air cuff brake lock if the engine needs to stay on.



Place the ignition or air cuff key in the lockout box.



Team members should each place their personal locks on the lockout box.

### Maintain line of sight

Whenever feasible, it is best practice for the load driver to be out of the vehicle to assist or observe personnel who are working in the crush zone. The load driver should make sure they remain in the person’s line of sight. This is a good practice to follow during axle unpinning or pinning for steerable turns.

### After someone has been in the crush zone

Once work in the crush zone has been completed, do the following:

1. Reverse lockout, if necessary
2. Remove wheel chocks
3. Load driver should perform a visual check (by walking around the trailer or looking down both sides)
4. Load driver should remove visual indicators
5. Load driver should perform an “all clear” and honk the horn before moving.

### Performing an “all clear”


The transport driver should always perform an “all clear” before moving from a stop.


1. Do a verbal check (via radio) to ensure that no one is in a crush zone before you move the trailer.
2. Wait for every team member to confirm that they are out of the crush zone.
3. Honk the horn and wait for five seconds before beginning movement.


## Communications

### Call-Response-Confirmation

In high-risk situations where the load is moving at slower speeds (such as steerable turns), or any other time when a team member is on foot, radio communications should be in the Call-Response-Confirmation format.

 **“Call”** is a statement, a question, or a notification of intention.

 **“Response”** allows one or more members of the team to acknowledge that they have heard the information, or provide an answer to a question, if needed. The response must be more than a simple “copy that.”

 **“Confirmation”** is given by the person who first made the statement or asked the question.


### Communications need to be clear

Give precise measurements when communicating about distance.


### Don’t text and drive

Under no circumstances should a member of your team ever read or send a message while driving. There is no exception to this rule.

### Sterile channel

 Establish a sterile channel if you are navigating a hazardous portion of the route. A sterile channel is one where there is no small talk.

### STOP! STOP! STOP!

 Any member of the team can call “STOP! STOP! STOP!” at any time, and the entire team must stop immediately.

# Module 2: Route surveys

## Using route surveys during pre-trip activities



### What is a route survey?

A route survey is a detailed document that is separate from the permit. The route survey provides detailed information about the route and any hazards along it. The route survey ensures that the planned route can be safely traveled, and provides a step-by-step guide for the load movement team during the move itself.

### Who should receive the route survey?

The driver should receive a copy of the entire route survey from the carrier. Each member of the team should also receive a copy of the route survey or the route summary.

### The route survey should

- reflect accurate information about the load dimensions and the route.
- be consistent with the information on the permit(s).
- not be more than 30 days old, unless the route has been in continued use by the carrier since the survey was completed.

If the survey is deemed inadequate by any member of the team, or if any team member did not receive a copy of it, the move should not proceed.

## Using the route survey during the move

### Route survey as a reference

The route survey will help your team know what hazards are coming up along the route, and other key information such as which lane to be in to clear an overhead obstruction.

On multi-day moves, the route survey should be part of the pre-trip meeting each morning.

### If the permitted route can't be followed

- the load movement must stop and park safely.
- a new route must be authorized by the carrier and permitting agency.
- the carrier may ask for the team to perform a physical survey of the alternate route. The physical survey should be performed by the front P/EVO and the transport driver together. They should complete it in the same manner as a normal route survey.

### Alternate routes

The carrier and permitting agency are the only ones who can authorize an alternate route after it has been surveyed. Make sure to discuss the alternate route with your team so that everyone understands the hazards, and proceed with caution after receiving permission to do so from the carrier.

# Module 3: Pre- and post-trip meetings

## The pre-trip meeting

### Why have a pre-trip meeting?

Having a thorough pre-trip meeting and equipment check is the best way to avoid costly and dangerous incidents down the road. Everyone should come away from the meeting knowing what to expect along the route.

### Who should attend?

The driver is responsible for leading the meeting, but everyone must participate, and should feel free to speak up during it.

### When should the pre-trip meeting take place?

Meetings may need to take place more than once during the move. Pre-trip meetings should be held at the start of each day (on a multi-day move), and whenever additional personnel join the team.

### The preferred order of pre-trip activities is



1. Identify team members and roles



2. Inspection, measurement, and documentation



3. Route discussion and communications



4. Emergency planning

### Measuring the load

The driver and high pole P/EVO (if there is one) should measure the load at the start of the move. It is a good idea for the rest of the team to observe this process.

The load should also be measured at the beginning of each day on a multi-day move, and whenever the trailer or load configuration has been adjusted.

### Load dimensions on the permit

The actual load dimensions may not exceed those listed on the permit and route survey. Otherwise the move cannot proceed.

## Other meetings

### Modified or “on the go” meetings

If personnel join the team after the move has begun, you should stop as soon as possible and hold another meeting to get them up to speed.

### Post-trip activities

At the end of each day, your team should inspect the load for damage or shifting, put cones in place to protect the load, and make sure it is in a place where it will not be struck by traffic.

Post-trip meetings are an important way to build up your knowledge and skills.



Hold a post-trip meeting at the end of each day.



The entire team should be present.



Discuss what went well, anything that went wrong, and what could go better.



Plan for the following day’s pre-trip meeting, if you’re on a multi-day move.



Report any near misses to the carrier.



This is also the time to fill out any required documentation.

# Module 4: Best practices for front and high pole P/EVOs

## The job of a front/high pole P/EVO



The job of a front/high pole P/EVO is to warn oncoming drivers, assess whether the load can safely clear any obstructions, and control traffic, if needed.

### High pole equipment

The high pole and striker tip must be professional-grade, non-conductive, and rigid enough to withstand high speeds. The mount must be securely attached to the frame of the vehicle. Homemade or other non-professional-grade high poles are not acceptable.

### Setting the high pole

- Measure the load prior to setting the high pole.
- The high pole should only be set by the high pole P/EVO.
- The high pole should be set at least 6 inches above load height.

### Re-checking load and high pole measurements

At the beginning of each day, as well as anytime the trailer is raised or lowered, the driver and high pole P/EVO should confirm the load measurements and verify that the high pole is properly set.

### During load movement

The front/high pole P/EVO and the load driver must communicate and work together to make sure that all obstructions can be safely cleared. This includes ensuring that the load is in the proper lane of travel.

The load driver should make sure there is enough spacing between the load and the front P/EVO so that the load can safely stop if the high pole strikes an obstruction.

### If the high pole strikes an obstruction

1. Call STOP! STOP! STOP! The entire team must stop safely.
2. Notify the carrier immediately so that any other loads along the route know of the risk.
3. The high pole P/EVO and load driver should remeasure the obstruction slowly and carefully. Make sure to measure all the way under the obstruction—not just the edges.
4. Only the carrier can decide if the load is to proceed after remeasuring.

If the load cannot safely clear the obstruction, an alternate route must be approved and a revised permit issued.

Members of the movement team may never lift a utility line. If the high pole strikes a utility line, your team must request authorized personnel to lift it.

### If the load strikes an obstruction

1. All support vehicles must stop and park safely. Take care when exiting your vehicle.
2. Check for any injuries and call emergency services if needed.
3. Contact the carrier to report the incident, and follow their instructions.
4. Implement emergency traffic control measures (such as triangles, flares, or cones). Perform flagging duties to direct traffic around the area, if necessary.
5. Find a safe place to wait that is protected from approaching traffic and has a route of escape. It is recommended that you do not wait in your vehicles.

# Module 5: Best practices for steerpersons and rear P/EVOs

## Steerperson and rear P/EVO duties



### The job of a steerperson

A steerperson is a person who steers any axle, or group of axles, of an articulated trailer, while not on the trailer. A steerperson is different from a tillerman. A tillerman operates steerable rear axles while on the trailer, often at highway speeds.

If there is a steerperson on your team, it will be their duty to monitor trailer position and status throughout the move.

### The job of a rear P/EVO

The rear P/EVO is responsible for all standard rear piloting duties, including warning and monitoring traffic.

### Separate jobs, separate vehicles

A steerperson may not function as rear P/EVO on a move requiring WITPAC certification. The two jobs must be filled by separate personnel, and they must be in separate vehicles.

## Pre-trip activities for steerpersons

During the pre-trip meeting, the steerperson should inspect the trailer, remote, and pony motor, and coordinate with the driver if the pony motor needs more than one person to start it. Make sure there are extra batteries for the remote.

The steerperson should note the dimensions of the load, especially any rear overhang.

Discuss any steerable turns along the route. Everyone should know their role and position for each.

## During load movement

The steerperson must communicate clearly with the rest of the team regarding the trailer and load position, especially when the load is passing an obstruction or hazard. Due to road grade or other factors, it is possible for the rear of the load to strike an obstruction even if the front of the load was able to pass under it.

### Dusty roads

If you are following the load on a dusty road and the dust obscures your vision, ask the load driver and the rest of the team to slow down or stop until the dust clears. Close your windows so that the dust does not interfere with your breathing.

## Performing a steerable turn

### Plan ahead

Before leaving their vehicle, the steerperson should already be observing the scene and planning ahead for the turn. Remember to exit the vehicle safely (see the steps in Module 1).

### Crush zone safety measures

Any time a person will be entering a crush zone (for instance, to unpin or pin the axles), you should use the mandatory crush zone safety procedures (chock the wheels and use visual indicators). It is best practice for the load driver to exit the cab and remain in the steerperson's line of sight while they are in the crush zone. The team must also work together to monitor and control traffic whenever a team member is on foot.

### Take it slow

Slower is better on a steerable turn.

### Reverse the crush zone safety measures and perform an "all clear"

The load driver should always perform an "all clear" and honk the horn before moving if a team member has been in the crush zone.





## ROUTE SUMMARY FOR ENID, OK TO APACHE, OK

Prepared 2/24/2021

Reference route survey for details of numbered turns.

<u>Cumulative Mileage</u>	Begin at 7500 E. Chestnut Ave., Enid, OK	
0.0	Turn LEFT on N 66th St	
0.6	Turn LEFT onto US-412	Turn # 1
11.3	Bear RIGHT onto OK-74	Turn # 2
73.1	Continue onto I-44 W	*** Busy Area! ***
76.8	Take exit 120A onto I-40 W	
121.9	Take exit 101; LEFT onto US-281	Turn # 3
122.0	<i>Potential Rest Stop</i>	
138.4	Turn RIGHT onto OK-152	Turn # 4
142.7	Turn LEFT onto OK-146	Turn # 5 *** Wrong-way *** <i>Coordinate w/LE in advance</i>
148.6	Turn RIGHT to stay on OK-146	
149.3	Turn LEFT to stay on OK-146	Turn # 6 *** Wrong-way *** <i>Coordinate w/LE in advance</i>
153.2	Bear RIGHT to stay on OK-146	
154.4	Turn RIGHT to stay on OK-146	
154.9	Turn LEFT to stay on OK-146	
156.0	Turn LEFT onto OK-9	Turn # 7
164.1	Turn RIGHT onto US-281	Turn # 8
166.1	Turn RIGHT at E1380	Turn # 9 into site
Arrived		

**\* Route Survey Excerpt\***  
**For Classroom Use Only**

**ROUTE SURVEY FOR ENID, OK TO APACHE, OK**

*(Used with permission of American Transport Systems. Edited & revised for use in classroom instruction.)*

**Date(s) route was surveyed:** 2/22-23/2021

**Prepared by:** John Doe, Doe's Surveying, [john@jdoesurveying.com](mailto:john@jdoesurveying.com), (123)456-7890

**Prepared for:** Big Wind Trucking, dispatch: (456)789-0123

**Origin address:** TP&L yard, 7500 E. Chestnut Ave., Enid, OK

**Destination address:** JCT US62/US281 & CR1380, Apache, OK

**Overall truck & load description / dimensions:** GE 62m Blade on an extendable beam trailer w/manual rear steer capability; axles = 7 (4+3). Loaded length = 238', Height = 13'6, Width = 12'6, Overhang = 30', Weight = 112,000 lbs

**State approved route:**

OK – N. 66<sup>th</sup> St., 412E, 74/15S, I-44W, I-40W, 281E, 152W, 146S ,9S, 281S.

**Total mileage:** 166.1 miles

**List of stops & fueling locations:**

**I-40W, exit 101 (at US-281; mile 121.9)**

- Fuel Stop for Escorts and where Drivers can stop to wait for them: Wide shoulder on ramp; good opportunity for drivers to wait for pilot cars to fuel.
- Fuel Stops for Drivers: Love's Travel Stop located at this exit.
- Stopping Points for Evening: Southside of Sugar Creek Casino there is free truck parking, room for several sets. Good gravel parking lot.

**Pilot/Escort Vehicle Operators:**

- Three P/EVOs are required to safely use this route.
- Escort Positioning in this survey are suggestions; escort positions are the decision of the driver.
- Note that for the Escort Positioning illustrations in this survey:
  - Lead = Front Escort
  - Third = Rear Escort
  - Steer = Rear Steerperson



**\* Route Survey Excerpt\***  
**For Classroom Use Only**

**TURN # 2:** Highway US-412, exit RIGHT onto Highway OK-74/15 South [mile 11.3]

➤ **Estimated distance to next turn = 110.6 miles**



➤ **Escort Positioning**

**Lead:** Blocking northbound traffic on OK-74 on south side of turn.

**Third:** Blocking southbound traffic on OK-74 on north side of turn.

**Steer:** Steer trailer around turn radius to get on OK-74 South.

**Comments**

Bearing RIGHT on OK-74 heading south:

- Stop sign in porkchop and yield sign on right shoulder need to be removed.
- Both are removable.

\*\*\* At mile 73.1, Highway OK-74 runs directly into I- 44 W with no transition. #4 lane is only for right hand ramp exit onto I-40 West bound. Ramp is clear; no issues. **This is a busy area! Stay aware and check for curfews.**

\*\*\* At mile 76.8, take exit 120A from I-44 W onto I- 40 W.

**\* Route Survey Excerpt\***  
**For Classroom Use Only**

**TURN # 4:** Highway US-281 South, turn RIGHT onto OK-152 West [mile 138.4]

➤ **Estimated distance to next turn = 4.3 miles**



➤ **Escort Positioning**

**Lead:** Blocking Eastbound traffic west of turn.

**Third:** Blocking Westbound traffic east of turn.

**Steer:** Steering trailer through turn radius onto OK-152.

**Comments**

Bearing RIGHT onto OK-152 West:

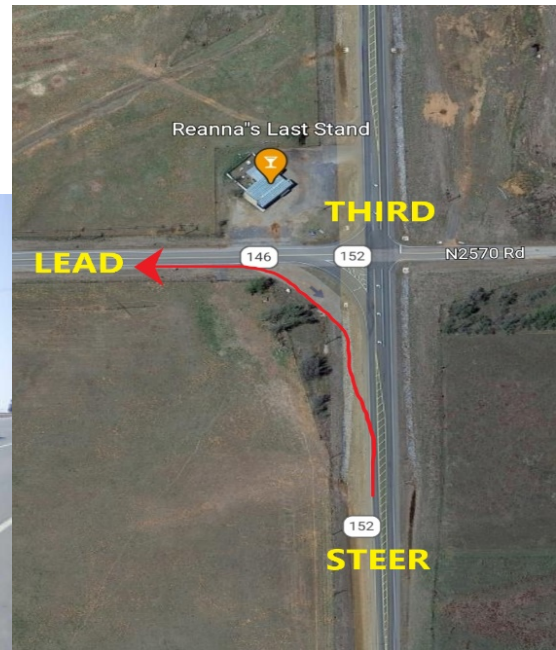
- Stop sign located in middle of porkchop; sign is removable.

This is a main street in a small town with street parking. When cars are parked here, they interfere with the turning radius. **Local police & municipalities must be contacted before entering city limits for permission & to coordinate for local police to assist.**

**\* Route Survey Excerpt\*  
For Classroom Use Only**

**TURN # 5:** OK-152 West **wrong way turn** LEFT onto OK-146 South [mile 142.7]

➤ **Estimated distance to next turn = 6.6 miles**



➤ **Escort Positioning**

**Lead:** Blocking traffic northbound on south side of turn.

**Third:** Blocking traffic eastbound on west side of turn.

**Steer:** Steer trailer through **\*\*\* wrong way turn \*\*\*** onto OK-146 South.

**Comments**

**\*\*\* Driver will need to turn against oncoming traffic (\*\*\*) wrong way (\*\*\*)!**

**Local police & municipalities must be contacted beforehand for permission & to coordinate for local police to assist.**

Turning LEFT onto OK-146 south:

- Stop sign will need to be removed in middle of shoefly in roadway; sign is removable.

**\* Route Survey Excerpt\***  
***For Classroom Use Only***

The route has been physically surveyed and is hereby certified that (1) there is safe and sufficient clearance throughout the entire proposed routing, (2) turns at all intersections can be traversed, (3) all overhead structures can be traveled under, (4) steep grades can be traversed, (5) cities are identified, (6) all parking and stop-off locations are identified, (7) the vehicle Gross Weight does not exceed any highway or bridge posted weight limit, (8) the survey has been physically performed by actually driving the entire proposed route, (9) State Routes are identified by highway number, (10) local roads and streets and other non-state highways are listed in parentheses for routing continuity, and that authorization for their use will be obtained by the applicant from the appropriate authority.

Surveyor Signature: <i>John Doe</i>	Date: 2/24/2021
Printed Name: John Doe	Company: Doe's Surveying



**Oklahoma Department of Public Safety**

Phone: (405) 425-7012  
General OS/OW Permits

Permit Number: 20210002337217

O

OS/OW: Y / Y Issued: **02/25/2021** Start Date: **02/26/2021** End Date: **03/02/2021** Contact: **JOHN**

K

User/Mover:	<b>BIG WIND TRUCKING</b>	Ordered By:	<b>BIG WIND TRUCKING</b>
Address:	<b>321 Fourth Street Townville, TX 56789</b>	Address:	<b>321 Fourth Street Townville, TX 56789</b>
USDOT No:	<b>0123456</b>		

D

**Trailer Information**

Trailer Make: **TRAIL KING INDUSTRIES** Trailer Year: **2019** Tag Number: **98-76543** Tag State: **XX** Trailer Fleet Unit: **5185A53**

P

**Oversize Vehicle Information**

Forward Overhang: **0-0** Rear Overhang: **30-0** Total Length: **238-0** Max Height: **13-6** Max Width: **12-6** Trailer and Load: **205-0**

S

**Weight and Axle Information**

Axle Groupings: **16.0; 18.0; 18.0; 18.0; 14.0; 14.0; 14.0** Axle Distances: **20-4; 4-6; 4-6; 137-0; 6-0; 6-0** Register For: **90000.0** Number of Axles: **7** Gross Weight: **112000** Overweight From: **80000.0** Overweight By: **32000.0**

O

**Truck Information**

Truck Make: **KENWORTH** Truck Year: **2007** Tag Number: **XYZ 456** Tag State: **XX** VIN: Truck Fleet Unit: **7066**

K

**Route Information**

Statewide Travel: **NO** Route: **NEW ROUTE** Going To: **COUNTY ROAD 1380,Anadarko,OK [35.014723,-98.356381]**  
Starting From: **E CHESTNUT AVE,ENID,OK [36.405073,-97.782848]** Starting State: **OKLAHOMA** Arrival State: **OKLAHOMA** Starting County: **24** Arrival County: **08**

**Trailer Load Information**

Serial: Load Description: **WINDMILL BLADE**

D

**Permit Restrictions**

P

All vehicles traveling Oklahoma turnpikes with loads in excess of 9-6 width shall be equipped with a Pikepass and utilize appropriately sized pikepass lanes.  
Must maintain minimum speed on interstates.  
Commercial Trucks are required to be registered for at least the amount of weight carried or the maximum of 90,000 lbs.  
Escorts front and rear required on 2-lane and super 2-lane highways. Rear escort required on all multi-lane highways.

S

**\* Excerpt of Full Permit \*  
For Classroom Use Only**



**If your route traverses City or County roads, D.P.S suggests you contact the respective City Street Dept. and/or County Commissioner and reference any possible restrictions or obstacles within their jurisdiction that may impact your ability to travel. Permit holders are allowed a five (5) mile egress from city or county roads displayed on the permit to accommodate local restrictions which may be imposed by local authorities.**

Travel is discouraged and may be denied during periods of inclement weather such as high winds, decreased visibility, heavy rain, snow, sleet, ice, etc.

**ROUTE PASSES MOMENT AND SHEER WITHOUT VIOLATION. NO OHP ESCORT REQUIRED PER: LT. PRESTON LAY #177**

**Standard Restrictions**

- #1 All overweight & oversized vehicles shall bypass load posted bridges if weight is in excess of the posted limit.
- #2 It is the responsibility of the permit holder/operator to contact all utility companies which may be encountered or impacted during the move.
- #3 All OS/OW loads shall be non-divisible.
- #4 Oversized loads are not allowed movement one half hour after sun down to one half hour before sun up.
- #5 Oversized loads shall not travel on specific holidays.
- #6 No oversized movement is allowed on the Interstate Highway System between the hours of 7:00 am & 9:00 am or between 3:30 pm & 6:30 pm in Tulsa, Cleveland and Okla. Counties, Mon. - Fri.

**Legal Agreement**

I, as the owner, operator and/or authorized agent, certify the information shown on this permit is true and correct. I attest to the fact this vehicle and/or load will be in strict compliance with all state statutes, rules and regulations governing its movement. I understand this permit will be deemed void if any laws or restrictions are violated.

**This permit must be in the drivers possession and the driver has the ultimate responsibility to avoid hazards and unsafe conditions.**

REGULATION OVERSIZE LOAD SIGN REQUIRED FOR ALL OVERSIZE LOADS

**Charges:**

<b>Payment Type:</b>	Bond
<b>Oversize Base Charge:</b>	\$40.00
<b>Overweight Base Charge:</b>	\$40.00
<b>Overweight Charge:</b>	\$320.00
<b>Delivery Fee:</b>	\$2.00
<b>Credit Card Fee:</b>	\$0.00
<hr/>	
<b>Total Charges:</b>	\$402.00

**\* Excerpt of Full Permit \*  
For Classroom Use Only**

**Driving Directions:**

Miles	Instruction
0.5	Start on N 66th St (Contact Local Municipalities)
0.1	Continue onto 66th St (Contact Local Municipalities)
2.0	Turn LEFT onto US-412 (US-64, OK-15) EB
8.7	Continue onto US-412 (US-64, OK-15) EB
0.2	Take exit OK-15
0.1	Continue onto (Unknown road name) (Contact Local Municipalities)
5.3	Bear RIGHT onto OK-74 (S Highway 74) SB
36.3	Continue onto OK-74 (1st St) SB
4.8	Turn RIGHT onto OK-74 (S Portland Ave) SB
2.8	Continue onto OK-74 (N Portland Ave) SB
5.3	Continue onto OK-74 S (N Portland Ave) SB
7.5	Continue onto Lake Hefner Pkwy S (OK-74 S) SB
2.9	Continue onto I-44 W (OK-3 E, Will Rogers Expy S)
0.3	Take exit 120A
44.9	Continue onto I-40 W (US-270)
0.2	Take exit 101
0.1	Turn LEFT onto US-281 (OK-8, N Broadway Ave) SB
4.1	Continue onto US-281 (OK-8, N Broadway Ave) SB
2.5	Continue onto S Broadway Ave (S Broadway St) SB
5.6	Continue onto US-281 (OK-8, US Highway 281) SB
0.1	Continue onto US-281 (OK-8, US Highway 281) EB
2.3	Continue onto US-281 (OK-8, US Highway 281) SB
0.9	Continue onto US-281 (OK-8, US Highway 281) EB
0.8	Continue onto US-281 (OK-8, N Broadway) SB
0.1	Bear RIGHT onto (Unknown road name) (Contact Local Municipalities)
0.5	Bear RIGHT onto OK-152 (Main St, W Main St) WB
3.8	Continue onto OK-152 (State Highway 152) WB
7.9	Turn LEFT onto OK-146 (State Highway 146) SB
5.4	Turn RIGHT onto OK-146 (State Highway 146) SB
1.0	Turn LEFT onto OK-9 SB
3.4	Continue onto OK-9 (2nd St, Hazlett St) SB
3.7	Bear RIGHT onto OK-9 EB
2.0	Turn RIGHT onto US-281 (US-62) SB

Approximate Mileage: **165.7**

**Permit Number: 20210002337217**

**\* Excerpt of Full Permit \*  
For Classroom Use Only**

# Pre-Trip Meeting Sheet



Today's date \_\_\_\_\_ Time of meeting \_\_\_\_\_

Company name \_\_\_\_\_ Carrier dispatch # \_\_\_\_\_

Origin point \_\_\_\_\_ Delivery point \_\_\_\_\_

## Team members and roles

**Load driver** Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

**Front P/EVO** Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

**Rear P/EVO** Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

**Steerperson** Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

## OTHER PERSONNEL

Role \_\_\_\_\_ Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

Role \_\_\_\_\_ Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

Role \_\_\_\_\_ Name \_\_\_\_\_ Cell # \_\_\_\_\_ Vehicle \_\_\_\_\_

- Team members can identify each other by voice
- Team members are carrying proper certifications, licenses, insurance
- Team members are wearing correct PPE  
(boots, hard hats, vests, safety glasses, or other required apparel or equipment)

## Inspection, measurement, and documentation

- Load is free of damage, or damage has been documented
- Load is secure
- Vehicle and equipment check has been completed for all vehicles:

### Radios

- All radios are working and compatible
- Backup communication devices and power sources are present

### Pilot/Escort Vehicles

- Licenses and tags are current on all vehicles
- Vehicles and trailer are in good mechanical condition, including lights, tires, and all other systems
- All signs and other required warning devices are in good condition and in place
- High pole is of proper type and in good condition
- All other required equipment is present and in working order

### Tractor

- Lockout equipment is complete and in working order
- Wheel chocks
- Cone(s) or other visual indicators

### Steerable trailer (if applicable)

- Axle pins are present and in good condition
- Pony motor is working and has fuel
- Remote is working and has backup batteries, if needed

*Pre-trip meeting sheet continues on other side.*

**Loaded dimensions:**

Max. height: \_\_\_\_\_ Max. width: \_\_\_\_\_  
 Rear overhang: \_\_\_\_\_ Front overhang: \_\_\_\_\_  
 Weight: \_\_\_\_\_ Min. ground clearance: \_\_\_\_\_ Overall length: \_\_\_\_\_

**By initialing below, I confirm:**

- |  |  |
|--|--|
| <input type="checkbox"/> That the measurements of the load in traveling configuration are consistent with those on the permit and route survey | <input type="checkbox"/> That the route survey is no more than 30 days old, OR has been in continued use by the carrier since the survey was completed |
| <input type="checkbox"/> That the permit and route survey are valid  | <input type="checkbox"/> That the high pole has been set to the following height: _____  |
| <input type="checkbox"/> That the high pole is professional-grade  |  |

**Initial here:** Driver \_\_\_\_\_ Front P/EVO \_\_\_\_\_ Rear P/EVO \_\_\_\_\_

**Route and communications**

**Review and discuss the route:**

- |  |  |
|--|--|
| <input type="checkbox"/> Confirm team member roles, responsibilities, and positions during each portion of the route | <input type="checkbox"/> Construction zones and railroad crossings, if any                                   |
| <input type="checkbox"/> Determine safe and lawful distances between P/EVOs and load for each section of the route   | <input type="checkbox"/> Special restrictions (such as curfews)  |
| <input type="checkbox"/> Turns, obstructions, and hazards  | <input type="checkbox"/> Fuel stops, breaks, re-fueling  |
|  | <input type="checkbox"/> Review crush zone procedures, including visual indicators to be used by load driver |

**If movement includes a steerable trailer, discuss:**

- |   |   |
|---|---|
| <input type="checkbox"/> Trailer features: pinning, unpinning, pony motor | <input type="checkbox"/> Positioning on steerable turns |
|---|---|

**Communications planning:**

- |  |   |
|--|---|
| <input type="checkbox"/> Channels and alternates to be used:<br>_____                                      | <input type="checkbox"/> Confirm how lanes will be called   |
| <input type="checkbox"/> Identify emergency and backup communications                                      | <input type="checkbox"/> Review cell phone use policies   |
| <input type="checkbox"/> Confirm that all team members have working two-way handheld communication devices | <input type="checkbox"/> Review communications protocols (Call-Response-Confirmation, sterile channel, STOP! STOP! STOP!) |

**Emergency planning**

- |  |  |
|--|--|
| <input type="checkbox"/> Ensure that team knows what to do if there is a mechanical breakdown or issue | <input type="checkbox"/> Identify safe havens                        |
| <input type="checkbox"/> Discuss emergency situations that may be likely to occur on route             | <input type="checkbox"/> Discuss railroad emergencies, if applicable |

If there is an emergency, the number to call is: \_\_\_\_\_

Team members who have first aid training: \_\_\_\_\_

Fire extinguishers are in these vehicles: \_\_\_\_\_

**Team members sign here to verify that the pre-trip meeting has been properly conducted.**

Name _____	Signature _____
Name _____	Signature _____
Name _____	Signature _____
Name _____	Signature _____

## Post-trip meeting sheet

Use the lists on this sheet to guide your post-trip discussion at the end of each day.

### Step 1: Review today's activities

- What went well?**  
Tell each other what you are doing well. Compliment each other where deserved.
- What went wrong?**  
If anything went wrong, have an honest discussion about the cause or multiple causes. Do not look for who to blame—look for what can be done differently to keep it from happening again.
- What could go better?**  
Share your ideas for improvement.
- How were communications?**  
Was everyone transmitting loud and clear? Was everyone communicating in a clear manner?
- How was spacing?**  
Was everyone comfortable with the spacing between vehicles? Does anything need to be adjusted next time?
- Did anyone notice mechanical issues?**  
Examples might include pulling to the left or right, intermittent rear steering problems, or unusual noises during transport.
- What do other teams need to know about this route?**  
Were there any hazards or other issues that were not noted on the route survey? The load driver should communicate these points back to their carrier management so other teams can be warned in advance.

### Step 2: Plan for tomorrow's activities

- Is anyone leaving or joining the team? When and where?**  
This might include personnel such as a different P/EVO or a law enforcement escort.
- What time do we need to depart?**
- What is tomorrow's weather forecast?**
- Does everyone have copies of tomorrow's permits and route summary?**
- Does anyone need any help getting their equipment ready for tomorrow?**
- Does any equipment need to be repaired or replaced before we depart tomorrow?**