



## Planning Guide

### US Sailing Approved Moderators

Hiring an approved Moderator is required before your course can be sanctioned by US Sailing. You will find a listing of approved Moderators below. If you would like to use someone not on the list below, you must submit (in writing) a sailing and teaching/speaking resume of your candidate for US Sailing approval at the same time you submit your Host Agreement. The Moderator must be approved by US Sailing before your course will be sanctioned or posted on the calendar.

Your Moderator should provide ongoing support as well as organizing and promotional guidance in the months preceding the course. S/he handles one or more of the key presentations, is the linkage between the indoor sessions and outdoor demonstrations and connects what is happening on the water to the classroom presentations. A continuous stream of conversation with the audience is useful and instructive. Moderators are up-to-date safety experts, experienced public speakers, and have mastery of their subjects. A current list of approved moderators can be found [here](#).

### US Sailing Safety at Sea Course Planning Guide

This guide provides basic ideas and guidelines to help you plan a successful US Sailing Sanctioned Safety at Sea Course. Racers and cruisers in your area will benefit from the knowledge of experts and local presenters during sessions about training crew, preparing boats, selecting equipment and handling offshore conditions. You will find information about facilities, attendance, budgets, committee assignments, and marketing and promotion. Please keep in mind during the planning process that any of the Moderators would be pleased to provide information and assistance. Their experiences are a valuable resource.

US Sailing offers three courses for coastal and offshore sailors. The courses are available using online training materials, in-person lectures, and hands-on sessions.

#### Coastal Safety at Sea Course:

- This course is for Inland and Coastal racers as well as the Cruising sailor.
- This course can be taken either in-person at a Coastal Safety at Sea Course or by taking the Coastal Safety at Sea Online Course
- Topics include
  - Giving Assistance
  - Personal Safety Gear
  - Crew Overboard Recovery
  - Emergency Communication
  - Search and Rescue.
- The course takes approximately four (4) hours to complete.

#### Offshore Safety at Sea Course:

- This course is for Crew Members of Offshore Races, Long Distance Cruising Sailors, or any sailor looking to improve their sailing skills and hone up on safety protocol and procedures.
- This course can be taken in-person at a one-day Offshore Safety at Sea Course or can be completed online by taking the Offshore Safety at Sea Online Course.

- Topics include all subjects covered in the Coastal Safety at Sea Course plus:
  - Crew Health
  - Marine Weather
  - Cold Exposure
  - Care and Maintenance of Safety Gear
  - Signals
- The course takes one (1) day/eight (8) hours to complete.

### **International Offshore Safety at Sea with Hands-On Training:**

- This course is for Crew Members participating in International Races or where a World Sailing (ISAF) certification is required, as well as Long Distance Cruising Sailors, and any other sailor who wishes to be safer on the water and gain hands on practical experience with aspects of safety listed below.
- This Certificate can be earned several ways:
  - Complete a two-day International SAS with Hands-on Training weekend; OR
  - Complete a One (1) day Offshore Course followed by day of Hands-on Training (proof of completion of Offshore Safety at Sea Course within 365 days of Hands-on);  
OR
  - Offshore Safety at Sea Online Course followed by a day of Hands-on Training (proof of online course completion within 365 days of the Hands-on course);  
OR
  - Complete an approved Refresher Course for International Safety at Sea
- Topics include all of those from the one-day Offshore Safety at Sea Course plus the following hands-on sessions:
  - Liferaft
  - Life jackets
  - Fire
  - Pyrotechnics
  - Communications
- The course takes approximately fourteen (14) hours to complete.

### **To conduct a successful course, we suggest you consider the following;**

1. Decide whether you are hosting a Coastal, Offshore, or International Offshore course.
2. Form a Safety at Sea Organizing Committee
3. Select a date for your course. Check the US Sailing website to ensure that you're not in direct conflict with an already-scheduled course in your area.
4. Select and contact a Moderator to ensure availability.
5. Fill out the [Host Agreement](#) to US Sailing.
6. Create a marketing and promotion plan.
7. Based on your anticipated audience size, select an appropriate facility.
8. Create a budget for your course using the US Sailing spreadsheet
9. Select how you'll handle registration.
10. If desired, seek local sponsorship.
11. Work with your Moderator to select local and national presenters, and to assign topics. Create a schedule for each day of the course with assistance from your Moderator.

12. Ask for guidance and help from US Sailing regarding any details or questions.

Questions or suggestions about the US Sailing Safety at Sea Courses should be directed to

**US Sailing Adult Programs**

[safetyatsea@ussailing.org](mailto:safetyatsea@ussailing.org)

1 Roger Williams University Way, Bristol, RI 02809

Phone: 401-342-7900, extension 7914 or 7934

Fax: 401-342-7940

## Detail of Action Items

### 1. Decide whether you're going to offer a Coastal, an Offshore, an International Offshore, or a Hands-on only course.

This decision depends largely on whether your course is held prior to a race where Safety at Sea training is required. Many transoceanic races now require the International Offshore Safety at Sea Course, for 30% of the crew, including the skipper or watch captains.

Other races may require the Offshore Safety at Sea Course, while coastal races frequently require the Coastal Safety at Sea Course. By knowing the requirements of the Notice of Race for races in your area, you can best meet the needs of the sailors.

Recently, the International Offshore Course Safety at Sea Course has become more common across the country, and it now considered the "standard" course that most folks want to take. While it's more complicated logistically to manage, sailors who experience it are frequently the best salespeople for it, since they can appreciate the value of the hands-on training.

There are online versions of the courses that are complementary to the traditional "in-person" courses. The following chart illustrates the ways that students can get their certifications.

Type of Course	Method of Delivery	Time and Number of Topics	Comments
Coastal Safety at Sea	Online	4 hours, 5 topics	
	In Person, Lecture	4 hours, 5 topics	Ideal for boat shows, yacht clubs, community sailing organizations.
Offshore Safety at Sea	Online	10 hours, 10 topics	
	In Person, Lecture	8 hours, 8-10 topics	Ideal prior to offshore races.
International Offshore Safety at Sea	Online	10 hours, 10 topics, plus 1-day of Hands-On training	Must be accompanied by Hands-On supplement.
	In Person	16 hours, 15 topics, including 1-day of Hands-on training	Generally held over a weekend.
International Offshore Refresher course	In Person	8 hours, 6-8 topics	For International Offshore certificate holders who want to renew.

### 2. Form a Safety at Sea Organizing Committee

While there have been many successful courses planned and executed by a dedicated individual, planning and hosting a successful course is best accomplished via an organizing committee. Including others from the sailing community will enhance the experience of your attendees by adding a diverse range of expertise. Ideally, planning should begin 9-12 months before a course.

- Consider seeking out sailors for the committee with experience in a specific area and assigning responsibilities as well as dividing the labor. Aside from a planning committee, organized volunteers will be needed to help with the actual event.
- It is beneficial to designate a committee member as the volunteer coordinator.
- Other committee member responsibilities may include budgeting, presenters, marketing and publicity, equipment, signage, registrations, materials distribution, facilities, presenter support, food & beverages, audio/visual, safety, cleanup and security.
- Please note this is not a comprehensive list. Each event will have many other details that require attention. Your sailing community local yacht clubs are excellent places to solicit for assistance.

***A planning timeline might look like this:***

**1 year ahead:** form your committee, conduct market research, and establish a budget.

**9-12 months before event:** set date of event, fill out the [Host Agreement](#), select a [Moderator](#) from US Sailing and begin selecting presenters, create a marketing plan, find and select your venue.

**6-9 months:** work with the Moderator to establish a rough schedule, arrange for presenters, for USCG assistance, and set up registration process.

**4-6 months:** start taking registrations, begin marketing push.

**3 months out:** finalize the agenda with your Moderator, rent any required equipment you need, concentrate on marketing, insure the [Moderator's](#) travel & lodging arrangements are made.

**2 months out:** Communicate with US Sailing staff regarding your expected attendance. Some of the support materials need to be mailed and require some lead-time to ship. You will receive banners from US Sailing. US Sailing has a new Safety at Sea book available through our online store.

**1 month out:** make a final push to fill your course/venue.

The standard US Sailing Offshore Safety at Sea Course is a one-day lecture style event. This format allows each presenter to give one presentation on a subject to the entire group at the event. Many courses include a demonstration by a USCG rescue helicopter and COB rescue if the waterfront venue permits. This demo requires that the course group to move outdoors. If your demonstration includes a Lifesling or Quick Stop rescue method demonstration, arrange and practice it with your crew before the event. Several courses have struggled with this part of the program. It takes careful planning and practice to ensure that it is presented professionally, and the attendees understand the process. Please contact US Sailing's office if you have any questions.

If you are planning to host an Offshore Safety at Sea Course, consider adding a second day that includes Hands-on Training day to your course. This will enable some participants to acquire the International Offshore certificate which is needed for crew participating in a sailboat race where the International Offshore course is a requirement for some portion of the crew. If your event is being

held prior to race that has this requirement (check with local race organizers), we encourage you to add this second Hands-on day. This Hands-on day greatly expands the amount of information presented to attendees, but also increases the complexity of logistics. For example, a pool is necessary for the life raft training and several classrooms are needed for the sessions. You may have to pay to have a lifeguard on duty and/or have additional insurance to cover the in-water training. But for those locations where the sailors require the additional certification, it makes sense to offer it.

*Note that Appendix G of World Sailing Offshore Special Regulations recommends a maximum class size of 20 for hands-on training. Completion of the classroom lecture (first day) and Hands-on training (second day) within the same calendar year earns the participant a World Sailing Approved Offshore Personal Survival Course Certificate that is valid for five years. In the U.S., the trend is to use classes of 12-20 students who rotate through various "stations" during the second day, allowing up to 80 students to participate in the hands-on day.*

### 3. Select a Date for your Course

It is important to check the US Sailing posted list of scheduled Safety at Sea Courses to make sure that your course does not conflict with another course in your area. You don't want to have to compete for participants on the same dates with another local or regional event unless the demand is high.

### 4. Moderators and Presenters

For your course to be sanctioned, you must use an [approved Moderator](#). The Moderator must be involved in the scheduling to ensure all the required topics are covered. The Moderator can provide invaluable feedback on what works and doesn't from their experience of past events. In addition, you will want to bring in local "experts" for specific topics. Keep in mind that not everyone is a good public speaker even if they are very knowledgeable about their subject matter. Try to observe a presentation by a prospective presenter before making a commitment. Work with your Moderator to be sure that the time allotted is appropriate to the subject matter. Encourage any new presenter to present their material to your committee first, and to consult with the Moderator.

All presenters should be provided with a copy of the US Sailing's ["Safety at Sea Book, A Guide to Safety Under Sail and Personal Survival"](#). They should also be given a copy of the Learning Objectives for the chapter they will be presenting. The Moderator will work with each new presenter to make sure they are "on topic". One trap to be avoided is having the local "pro" speak on a topic that seems to be appropriate, but on which s/he may not follow the recommended sub-topics or learning objectives. "Pros" often rely on sea stories to make their points and end up not providing actionable information. This often happens during presentations on Marine Weather, Heavy Weather, and Damage Control.

Presenters on marine medical topics should fully understand the issues that directly affect sailors, which generally require that they are active sailors themselves. We find that emergency room doctors and nurses who sail offshore, as well as doctors and nurses with wilderness medicine experience, do an excellent job. It's even better when the same professional can speak to the issues of Crew Health as well as Drowning and Cold Exposure.

Moderator fees are \$1700 for the course and \$500 for a second day. The recommended fee for a second strong presenter is \$500. In addition, the travel costs for the Moderator and presenters are

covered by the organizer. NOTE: in smaller venues, and especially when the venue is close to the moderator's home, it may be possible to negotiate this fee.

If possible, obtain advance copies of any materials that are to be handed out. US Sailing suggests distributing digital versions posted to your website rather than printing hard copies. This practice reduces the use of paper and saves time and money. Some Moderators or presenters consider their portion of the presentation to be intellectual property and may not make it available.

Consider having a clock visible to the podium. The Moderator will do his/her best to keep the presentation on schedule, but a visual cue is helpful. Audience members will appreciate an event that keeps to the schedule and the Moderator will appreciate assistance in keeping lectures within the time frame permitted.

## 5. Fill out your online [Host Agreement](#)

Consult the existing Safety at Sea Calendar to verify that there is not another SAS Course in your area on the same date that is being considered. A signed US Sailing Sanctioned Safety at Sea Course 2019 Host Agreement must be submitted for US Sailing to add an event to the official calendar and to national advertisements. If your agreement is not complete or not signed, the course will not be sanctioned, and the participants will not receive the necessary certificates.

US Sailing recommends that a Host Agreement be executed and returned 9-12 months before an event. However, for those courses that are 'last minute' events, we recognize that this may not be possible.

## 6. Marketing and Promotion

Marketing is usually critical to filling an event. Consider hiring someone to help with this if you don't have an experienced volunteer. Note: Keep in mind that many courses will have a burst of registrations in the last two weeks. Make sure that you have a maximum number of attendees in mind and avoid overselling the event.

National promotion of the event will be done through US Sailing and will include advertising in publications and/or digital media, as well as on the US Sailing website. US Sailing recommends robust, grass roots promotion to fill your course. Suggestions Include: targeting local yacht clubs, sailing websites, blogs, and Facebook.

Create an event page and, if you are not handling registration through US Sailing, use a landing page through your registration host. Meet with your local sailing publications to create a marketing strategy that includes plenty of repetition. Schedule a monthly press release to local newsletters and buy advertising. Create posters (US Sailing and other organizers can provide photos & logos) and place them in stores, yacht clubs and other chandleries.

These should be posted 2 to 3 months before the event. Some courses are associated with an offshore race will have a "built in" potential audience. In those cases, work closely with race organizers to be sure the course is promoted on the event website, within race promotional materials and written communications.

Contact local race organizers and celebrities that might be willing to help with promotion. Contact clubs and other organizers of related events; ask them if you can give a five-minute promo before their event. Many yacht, and cruising clubs are looking for monthly presenters and topics of

discussion. Become a promoter. Use fleet newsletters and local races to publicize. Try using public service announcements on the radio and TV.

## 7. Facilities

Courses are offered in many different types of facilities. Everyone attending should be able to see and hear the presenter clearly. Community colleges work well for courses, as do large yacht clubs, community centers and theaters. Plan to have enough room for everyone to be able to be comfortable for a full day, including any last-minute walk-ins at registration.

An ideal facility will have:

- an auditorium or ballroom type space allows for:
  - the use of high quality audio & projection equipment,
  - ability to darken room with window treatments or darkened windows,
  - plenty of seating and legroom,
  - temperature control,
  - adequate lighting, and
  - a space for vendors if you choose to include them.
  - It is helpful if there is enough space for "on deck" presenters to prepare and display safety equipment.
- easily accessible restrooms,
- convenient parking
- Have a dedicated Registration table staffed with volunteers whose job is to check in attendees each day of the course, and who will verify and note Offshore or Online completion certificates for the Hands-on Day only attendees.

### Audio/Visual Equipment and Testing

Audio/visual equipment is an important component (and significant expense) of any course although many facilities can provide A/V equipment as part of the facilities rental. A large screen as well as a projector and laptop cables for the Moderator and presenters will be needed. Be sure to set up and test all equipment thoroughly with each presenter to avoid a course that fails due to technical problems.

NOTE: The need to be able to darken the room sufficiently is often overlooked. Ambient light from windows, especially in the morning and afternoon, can overwhelm any projector. Make sure your facility can be made dark enough. Use black drop cloths over windows if no curtains are present. Also make sure that the projector you intend to use has enough light output to provide bright, crisp images.

Including "in-the-water" sections and addressing safety concerns

- Plan to have adequate, properly certified lifeguards and rescue boat operators available.
- Make sure everyone will be wearing USCG approved lifejackets.
- Consider bringing everyone together before the event to practice working together on this portion of the event Use handheld radios to communicate.
- Obtain appropriate permits from local authorities and the USCG, especially if you need to control other vessels in and around the demonstrations.
- Contact local U.S. Coast Guard, law enforcement, fire departments, and 911 operators before demonstrating visual distress signals. If you wait to call the day of the event you may be told you cannot hold your demonstration.
- Have an Emergency Action Plan (EAP) in the event of a real emergency.

## 8. Budget

Successful courses are those that establish a budget with a minimal goal of breaking even for the event. This can be accomplished with somewhere between 75 to 100 attendees. The cost to attend a typical full day course ranges between \$150 to \$175/person/day.

Keep in mind that there are fees due US Sailing for processing the certificates, see the [Host Agreement](#) for pricing. It is recommended that you build-in the cost of the "[Safety at Sea Book, A Guide to Safety Under Sail and Personal Survival](#)" for each participant. Contact US Sailing for pricing.

Use the US Sailing SAS Course budgeting [spreadsheet](#) (or one of your own) to make sure that all expenses have been anticipated, including speakers' fees, travel, food, etc.

It is important not to undervalue the cost of the training being offered. A typical mistake is to charge too little. Include equipment rental in the budgeting process. Often, equipment can be borrowed from local clubs, but it is important to ensure it works prior to the event. Another significant expense will be lunch, snacks and beverages for the attendees. Box lunches and a big coffee maker have worked well in the past. Catering costs can break any budget if not controlled. Be sure to have plenty of trash and recycling containers.

## 9. Registration and Certification Requirements

US Sailing recommends hosts utilize an online registration process either through US Sailing or another provider. Online registration will prevent errors and streamline the process. Posting an FAQ page is also recommended. Having a specific and explicit registration process will lighten the workload and prevent the host from answering the same questions over and over.

If you are using an alternative registration system, make sure that the registration process allows for credit card purchases (and make sure to budget for credit card fees).

Consider a discount for early registration to help boost registrants. Offering discounts for couples or multiple members of a crew encourages increased safety training for each boat and adds attendees quickly. Accepting registrations on the day of the event slows down the process and is cumbersome. Prior hosts have found that requiring pre-registration works to prevent delay and avoids overwhelming the facility and staff. If you plan on accepting registrations at the door, consider imposing a late fee.

Not only is it imperative to have complete information from each attendee in order to produce US Sailing certificates and maintain the US Sailing online lookup tool, it is critical that a host volunteer verify attendance and participation on each day of the course. Full participation is mandatory for getting your certificate. Attendees will want to know when certificates will be sent and may need them before a scheduled sailing event. It's important to communicate effectively and repeatedly about these deadlines. The format for submitting this information in an Excel is provided '[here](#)'.

## 10. Sponsorship

As stated earlier, US Sailing will do its best to publicize your sanctioned course in select magazines and/or any other digital media that it advertises Safety at Sea Courses in.

Sometimes US Sailing is able to secure national sponsors for Safety at Sea which may be able to assist with demonstration equipment. It is best to check with the office when you submit your [Host Agreement](#) to see if any assistance might be available.

Alternatively, you may want to contact a local life raft service center and offer them a sponsorship role in exchange for a raft and repacking. Since using a life raft for hands-on demonstrations can be expensive and a little complicated, don't leave this detail until the last minute.

Your organization may decide to include local vendors and sponsors. Keep in mind that merchandise sales at a Safety at Sea Course are discouraged, however vendors are allowed to take orders and fulfill them later. Adding vendors will change the type of facilities you'll require. Some courses charge a nominal fee for vendors to cover the related expenses. Other courses offer space to local business in exchange for local support of the event. In either case vendors should be low-key and specifically targeted to the audience and curriculum. Avoid including businesses that are not directly associated with marine safety.

## 11. Curriculum

Most courses run from 8am to 5 pm and have a 15-minute morning and afternoon break, and a 30-45-minute lunch break. The breaks can be put to good use by scheduling the helicopter, COB, or pyrotechnics demonstration during these times.

There is a total of fifteen topics that can be covered in a Safety at Sea Course, depending on several factors:

1. Whether you're sponsoring and Coastal, Offshore, or International Offshore course. Longer courses allow more topics.
2. What your local sailing conditions are, and what would be of the greatest benefit to your sailors, e.g. areas with cold water may want to emphasize Cold Exposure.
3. Availability of speakers on specific topics.

Topics that are considered mandatory, and which should be part of all types of courses, include:

1. Giving Assistance to Other Vessels
2. Personal Safety Gear
3. Crew Overboard
4. Safety Communications
5. Search and Rescue

Additional topics include:

6. Care and Maintenance of Safety Equipment
7. Fire Safety
8. Hypothermia and Drowning
9. Crew Health
10. Marine Weather
11. Heavy Weather
12. Storm Sails
13. Damage Control and Jury Rigging

14. Signals
15. Life Rafts and Survival

Finally, depending on the needs of the local audience, and the time that you have available, you may want to consider:

16. Lessons Learned from Sailing Incidents
17. Crew Selection and Training
18. Vessel Preparation

Each of these topics can be presented by your Moderator, however hearing from local experts makes for a better course. Discuss this with your Moderator. Ideally, your Moderator would present one of two topics, and other presenters would present additional topics based on their areas of expertise. If no local speaker is available, hosts should consider bringing in a nationally recognized presenter who can handle multiple topics in addition to the Moderator.

Your Moderator can provide a DVD entitled 'Helicopter Rescue Preparation Guide' if the local USCG is unable to attend, or if you have internet access, we can provide the links to two great Youtube rescue videos done by CCA and the USCG. Keep in mind that even if you have agreement from the USCG to perform a demonstration, an active SAR case will take precedence and they may not be able to participate in your course.

## **12. US Sailing Support**

US Sailing has been involved with hundreds of Sanctioned Safety at Sea Courses, and is familiar with what is, and is not effective. US Sailing's team and your Moderator are available to help answer questions and help when needed. Don't forget to communicate with US Sailing about expected attendance, support materials that need to be mailed to your course, and how US Sailing can help in the final push.