

TRAINING & EDUCATION POLICY MANUAL

Updated 8.26.2013

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1. INTRODUCTION

The information presented in this policy manual was compiled from the minutes of Training Committee meetings held since 1981 and from procedures, policy and materials as established under the direction of the Training Committee. This manual is meant to be a guide. For questions or concerns about a specific policy, contact the US Sailing Training Office at:

Phone: 401.683.0800

Fax: 401.683.0840

E-mail training@ussailing.org

Website <http://training.ussailing.org>

1.1 Training & Education Mission Statement

1.1.1 The mission of the US Sailing Training & Education Program is to promote safe opportunities to experience the joy of sailing and boating through educational systems, using quality instructors and materials, proven techniques and collaborative experiences for any person in any venue.

1.2 Objective of this Manual

1.2.1 The objective of this manual is to provide information and clarification regarding policies and procedures of US Sailing's Training and Education Program as established and approved by US Sailing's Training Committee.

1.2.2 Every effort has been made to ascertain that the policies included in this manual are current and applicable to US Sailing's Training Program. Certain policies remain as originally approved; others, no longer valid, or in use, or that required updating, are officially replaced by the policies enclosed herewith.

- 1.2.3** Whenever possible, the date of origination of a specific policy and its approval by the Training Committee will be noted in italics following the printed text. Example: (*As approved 3/20/99*)
- 1.2.4** Should the wording on an earlier policy be edited for clarity or currency, the following will appear immediately after the edited policy: (*As adapted from policy approved 3/20/99*).
- 1.2.5** To maintain the high standards and credibility of the US Sailing Training Programs, it is essential those involved with the various Training programs adhere to and support Training's established policies and procedures.

1.3 Omissions & Amendments

- 1.3.1** The policy manual will be available through the Training Office and on the website with updates, corrections and additions added when appropriate. The Training Committee will make the decision when to republish the manual. The website will always have the most current version available.
- 1.3.2** Policy matters not addressed in this manual should be brought to the Training Office for consideration. If there are any questions, corrections or omissions to policy found within this manual, the following steps are suggested:

1. Copy the page; circle the problem
2. Describe the nature of the problem
3. Note a solution or suggest alternative wording
4. Specify why you feel the change should be made
5. Forward to the Training Director at US Sailing, preferably via email:

Training Director
US Sailing
PO Box 1260
Portsmouth, RI 02871
401 683-0800
401 683-0840 (fax)
Email: training@ussailing.org

1.4 Acknowledgments

- 1.4.1** The format for this policy manual bears a design similar to the policy manual of the Canadian Yachting Association, and it is with gratitude that the US Sailing Training Committee thanks the CYA and their former Executive Director, Peter Wood, for their spirit of sharing. This project would have been even more daunting had the basic layout and manual design not been available for use as a basis for our effort. This policy manual will stand as an example of US Sailing's long-standing friendship and cooperation with the Training programs of the Canadian Yachting Association.
- 1.4.2** The development of the US Sailing Training & Education Policy Manual has been and will continue to be a National Faculty project with guidance and direction given by the Training Committee.

1.5 United States Sailing Association (US Sailing)

- 1.5.1** US Sailing is the national governing body for the sport of sailing in the United States as decreed by the Congress of the United States in the Amateur Sports Act of 1978 and amended in 1998. US Sailing operates as a non-profit 501(c)3 organization.
- 1.5.2** US Sailing is responsible for the administration of racing rules, race administration, Safety-at-Sea, selection and administration of the US Olympic sailing team, the training & education of boaters and instructors as well as many other areas in the sport of sailing. See the US Sailing website for complete information.
- 1.5.3** The membership of US Sailing consists of more than 38,000 members, thousands of whom are racing sailors with thousands more enjoying the sport as recreational sailors. Additionally, US Sailing membership includes 36 Regional Sailing Associations, approximately 125 member class associations and over 1,000 member organizations (public access, commercial sailing, camp, military, yacht club and other varieties of boating organizations).
- 1.5.4** In 1983, US Sailing sponsored the beginnings of the Training Program that is in place today. The first step was the development of a Level 1 Dinghy Instructor course with materials and techniques that prior to that time were not available on a national level. Building on the success of the Level 1 Dinghy Instructor course, development of the rest of the Training Programs followed.

- 1.5.5** US Sailing’s Training Program has helped set a standard of excellence for sailing instruction nationwide.

1.6 Training Committee

- 1.6.1** The mission of the Training Committee of US Sailing is to promote the enjoyment of sailing and boating through educational systems that use quality instructors, proven techniques and collaborative experiences.
- 1.6.2** The Training Committee of US Sailing is made up of volunteers who are also members of US Sailing. The Training Committee Chair and committee members are appointed by the Board of Directors. The Training Committee Chair generally serves for three years. The Training Committee Chair appoints Vice Chairs. There is no term limit for Vice Chairs or other members of the committee.
- 1.6.3** The Training Committee oversees and sets policy for *all* US Sailing instructor and Instructor Trainer certifications and training as well as other programs and events that fall under the Training & Education umbrella.
- 1.6.4** The Training Committee designates which projects they intend to move forward and assigns a project “Champion.” The project champion is an individual who has a strong desire to see the project through to completion, and has the objectivity to lead the project in the intended direction without being subject to outside policy and politics. The champion acts as Team Leader and Facilitator as well as project advisor.
- 1.6.5** The Training Committee oversees the following US Sailing Certification Programs: Keelboat (begun in 1994), Powerboat, Cruising Powerboat, Small Boat, and Windsurfing. Additional guidance in setting policy and procedure is provided by the Commercial Sailing Committee and the National Faculty.
- 1.6.6** The Training Committee oversees the National Faculty and may vote into policy recommendations set forth to the committee by the National Faculty. The Training Committee may also suggest topics for consideration by the National Faculty.
- 1.6.7** A list of current members of the Training Committee is available through the US Sailing Training Office and on the website.

1.7 National Faculty

- 1.7.1** Mission Statement: Formed in 1991 and directed by the Training Committee, the mission of the US Sailing National Faculty is to review existing courses, materials, techniques, policies and procedures for currency and excellence and develop new training products, programs and publications as needed. *(Approved 10/24/98 from National Faculty Recommendations 9/21/98)*
- 1.7.2** The National Faculty is not a policy-making body. The Training Committee, working closely with the Chair of the National Faculty and others involved in Training, selects the topics to be brought to the National Faculty's yearly session. It is possible and likely that a number of these items will be multi-year projects.
- 1.7.3** The Training Committee Chair selects the Chair of the National Faculty. There is no set term limit for this position.
- 1.7.4** Participation in the National Faculty is by invitation. Participation changes yearly and depends entirely on the projects identified. Participants may include experts in the field of sailing education, guests representing related fields or sports, US Sailing members who are active Instructor Trainers, Training Committee members and staff. None of the National Faculty is paid for their efforts - it is entirely a volunteer program.
- 1.7.5** Upon completion of each yearly session, or when a project is deemed ready for consideration, the Chair of the National Faculty presents the National Faculty's recommendations for new materials, procedures and/or policies (new or updated) to the Training Committee for their consideration. This will generally be at either the Annual General Meeting or the Spring Meeting.
- 1.7.6** All recommendations and submissions by the National Faculty must be approved by the Training Committee to be instituted.
- 1.7.7** Certain travel expenses for National Faculty attendees are reimbursable. Contact the Training Office for the most recent list of allowed reimbursable expense.

1.8 Regional Training Coordinators

- 1.8.1** Regional Training Coordinators (RTCs) are volunteer US Sailing members and local field representatives who assist in promoting and staging US Sailing's Training Programs, courses and products. **1.8.2** A volunteer RTC Chairperson, selected by the Training Committee Chair, communicates and advises RTCs of their duties and responsibilities and arranges for and conducts RTC meetings at least twice a year. The RTC Chair is also a Vice Chair of the Training Committee.
- 1.8.3** The RTC Chair, on behalf of the Training Committee Chair, appoints new RTCs after review with the Training Director, Area Director and other people who are familiar with their background, experience and service to the local and regional sailing community.
- 1.8.4** It is desirable to have at least one RTC in each of the US Sailing areas as noted in the US Sailing Directory. With few exceptions, RTCs can be found in most of the Regional Sailing Associations with some of the larger areas supporting two or three RTCs.
- 1.8.5** The initial appointment of new RTCs is for one year for evaluative purposes.
- 1.8.6** *New* RTCs are required to have an email address and attend at least one RTC and/or Training Committee meeting within a year of their appointment.
- 1.8.7** The RTC reports to the Training Director through the appropriate Training Coordinator in matters involving the scheduling and conduct of US Sailing courses.
- 1.8.8** *All* RTCs are encouraged to attend at least one US Sailing meeting or event a year at which an RTC meeting will be held. These meetings are essential for RTCs as it provides them with updates on new courses, policy, programs, publications and events.
- 1.8.9** Certain RTC expenses are reimbursable. Contact the Training Office for the most recent list of allowed reimbursable expense. All receipts and expenses must be submitted within 60 days or they will not be paid. *(Approved 10/22/88)*
- 1.8.10** Volunteers interested in becoming RTCs should contact the Training Office or the RTC Coordinator. A list of specific duties and responsibilities is available through the Training Office or the RTC Coordinator.
- 1.8.11** A list of current RTCs is available through the Training Office or on the US Sailing website.

1.9 Training Office

- 1.9.1** US Sailing's Training Office is responsible for the management of all training activities.
- 1.9.2** Training Office staff consists of a Training Director and sufficient staff to manage courses, maintain records & publications, handle inquiries, work with volunteers, the Training Committee, National Faculty, Regional Training Coordinators and others, and generally keep the Training Programs operating efficiently.
- 1.9.3** Volunteer Staff – From time to time, when seasonal work or areas of specific expertise are needed, volunteer staff assistants may be designated to assist the professional staff in the normal performance of their duties. Volunteer staff will normally perform their duties from their home location.

2. GENERAL DESCRIPTIONS & POLICIES FOR US Sailing INSTRUCTOR COURSES

(Policies specific to course types are listed separately)

2.1 Program Description

- 2.1.1** The US Sailing Instructor Course Training Program trains and certifies instructors and coaches who instruct and coach students/competitors in a wide variety of sailing and boating programs - public, private and commercial – from beginning sailing to international competition.

2.2 Goals of the Instructor Training Program

- 2.2.1** The principal goals of the Instructor Training Program are to teach and/or evaluate qualified instructor candidates in the techniques of teaching, student and group management and use of prepared program material, all with an emphasis on safety, learning and fun.

2.3 Instructor Course Varieties

- 2.3.1** The Instructor Course Training Program consists of 9 different comprehensive instructor training courses:

1. Small Boat Level 1 Instructor– a four-day (40 hour) course for experienced dinghy/multihull/small daysailing keelboat sailors. Those qualified through this course will teach at the learn-to-sail level.
2. Small Boat Level 2 Coach – a two-day course for instructors interested in teaching the techniques of beginning racing, racing tactics, the rules, ethics, drills and performance sailing skills.
3. Level 3 Coach – Contact the Training Office for information on beginning the minimum two-year process required for Level 3 certification. A prerequisite for consideration toward beginning the certification process is successful completion of the Small Boat Racing Level 2 Coach course. Those qualified at this level coach competitive

and experienced racing sailors in local and national competitions. (Levels 4 and 5 are under development.)

4. Level 1 Windsurfing Instructor – a four-day (40 hour) course for experienced windsurfing sailors. Those qualified through this course will teach at the learn-to-sail level.

5. Powerboat Instructor – A 3-day course for experienced powerboat operators who are interested in teaching hands-on, on-the-water boathandling, safety and rescue maneuvers, and mark-setting skills for race support in powerboats typically less than 26 feet in length. (*UPDATED AND APPROVED 3/13/2004: Powerboat Instructor Course is extended to three days to cover NASBLA standards*).

6. Basic Keelboat Instructor - A 1-3 day evaluative course for experienced keelboat instructors to test and evaluate their teaching and sailing skills. This certification includes the successful completion of written exams as well as other practical evaluations.

7. Cruising and Coastal Navigation Instructor Course - A 3-day evaluative course for experienced Basic Cruising, Bareboat Cruising and Coastal Navigation instructors to test and evaluate their teaching, sailing and navigation skills. Those candidates wishing to be evaluated as Coastal Navigation instructors must stay an extra half-day for an additional comprehensive written exam or take the Coastal Navigation test separately through prior arrangement with the Training Office (for an additional charge).⁸

8. Coastal Passage Making Instructor – A 5-day evaluation for experienced Passage Making instructors to test and evaluate their teaching, sailing and navigation skills. Candidates should expect to be evaluated on a wide range of criteria including, but not limited to: sail handling, docking, response to emergencies, navigation, boat systems, passage planning, organizational ability, team building/group interactivity. 99. Cruising Powerboat Instructor – a 3-4 day course for experienced powerboat operators who are interested in teaching hands-on, on-the-water boathandling, and cruising and basic navigation/piloting skills in cruising powerboats typically greater than 26 feet in length.

2.4 Course Scheduling

2.4.1 All courses should be scheduled at least four weeks in advance. (*As approved 10/18/97 from National Faculty Recommendations 9/28/97*)

2.4.2 A **two-week go/no-go deadline** will be instituted if applications and payment for a specific course are not received in the Training Office two weeks prior to the course and there are not enough registered/paid instructor candidates to form a viable instructor course.

2.5 Application & Fees

2.5.1 All appropriate application forms must be filled out in their entirety and where required, signed on the back by the candidate. If the candidate is under 18 years of age, an adult parent or guardian must also sign the instructor course application and the Statement of Understanding for a Minor Candidate.

2.5.2 Candidates under 18 must have a parent or guardian sign the Statement of Understanding for a Minor Candidate and bring it to the course on the first day.

2.5.3 Candidates shall be admitted into instructor courses in the order in which the Training Office receives and accepts paid and complete applications. *(As adapted from policy approved 10/21/95)*

2.5.4 An **“early registration” discount** is offered to anyone whose application and payment is received in the Training Office four weeks in advance of a course. *(As adapted from policy approved 10/18/97)*

2.5.5 A **late fee** will be charged to anyone who registers within one week of the date of a course. The late fee covers shipping and extra staff effort. *(As adapted from policy approved 10/18/97)*

2.5.6 **Decisions relating to the timeliness of course applications** received in the Training Office and whether an “early registration” discount or late fees apply are at the discretion of the Training Director. *(Approved 10/19/96 from National Faculty recommendations 9/29/96)*

2.5.7 **US Sailing retains the right to refuse entry** to an instructor course to anyone who failed the Personal and Interpersonal Practical Skills evaluation in a previous course and whose behavior and attitude appears contrary to those of a professional, open-minded, positive and enthusiastic instructor. US Sailing also reserves the right to deny course entry and/or certification for any individual whose formal background check reveals behaviors inconsistent with those required for teaching either youth or adult students.

- 2.5.8** It is acceptable to add extra fees to course scheduling data, such as “facility fee” or “optional lunch plan”. Fees are to be set and communicated well in advance, and would be collected by the host facility, not US Sailing. *(Approved 4/2/2005)*

2.6 US Sailing Membership Requirements for Instructor Course Candidates

- 2.6.1** **If the candidate is not already a US Sailing member**, US Sailing adult individual or family membership must be paid at the time of application to attend a course.
- 2.6.2** The requirement to hold current adult individual US Sailing membership applies to all instructor candidates, regardless of age, and includes Instructor General Liability Insurance. Note: Only one instructor certification per family membership is allowed.

2.7 Instructor Course Prerequisites

- 2.7.1** All Instructor candidates are expected to be familiar with the appropriate Course Description and Prerequisite Form for the course they are applying to and they should have the necessary skills in place to successfully complete the course.
- 2.7.2** Candidates are required to submit completed forms as appropriate at or before the instructor course they are attending. These will include, but may not be limited to: a Medical Form and the Safety Boat Skills Self-Assessment Form (if applicable).

2.8 First Aid & CPR

- 2.8.1** US Sailing will accept First Aid & CPR certifications issued by the American Red Cross (ARC) and CPR certifications issued by the American Heart Association (AHA), as well as those FA/CPR courses approved by the US Coast Guard or determined by the Coast Guard to meet or exceed the standards of the ARC and AHA. The list of Coast Guard “approved” FA/CPR courses and courses which are “determined to meet or exceed the standards of the American Red Cross and the American Heart Association courses” are

available from the US Coast Guard upon written request and through the Coast Guard website. *(As adapted from policy 3/99/Daly)*

- 2.8.2** First Aid and CPR certification is not required to take an instructor course, but is required for certification as an instructor.
- 2.8.3** A state licensed EMT, registered nurse or physician is accepted as having met US Sailing's First Aid & CPR requirements.

2.9 Age Requirement for Attendance & Certification

- 2.9.1** **Instructor candidates must be 18 years of age or older at the time of the course** to be considered for certification as a US Sailing instructor.
- 2.9.2** **Level 1 Instructor Candidates who have not yet reached their 18th birthday at the time of the course** will, upon successful completion of the instructor course, be designated Sailing Assistants until they reach their 18th birthday.
- 2.9.3** **All Level 1 Instructor Candidates must be at least 16 years old at the time of the course.** Those instructor candidates not yet 16 years old are required to wait until such time that they have turned 16. There are no exceptions to this policy.
- 2.9.4** Any candidate under the age of 18 must have their parents complete the parental release form. The candidate must present it to the Instructor Trainer on the first day of the course. *(As adapted from policy approved 3/18/95)*

2.10 Attendance

- 2.10.1** Instructor candidates must attend an instructor course in its entirety to be considered for instructor certification. Arriving late (more than 30 minutes) or missing a portion of a day may result in a Plan of Improvement. Missing a whole day will result in a Plan of Improvement, Plan of Completion or Failure of the course. Generally speaking, the Training Office will work with the instructor candidate to arrange for re-test, if applicable.

2.10.2 Should an instructor candidate leave or drop out of an instructor course, the course fee is non-refundable.

2.11 Confidentiality

2.11.1 Course paperwork consisting of the original course application form, self-evaluation sheets, all written evaluations whether noting written or practical test results and any remarks reported in writing by the Instructor Trainer to the Training Office is confidential and as such is not available for inquiries by other than the instructor, the Instructor Trainer or officials of the Training Committee. *(As adapted from policy approved 10/21/95)*

2.11.2 The Training Committee Chair, Vice-Chair of Standards & Credentials and the Training Director may authorize the release of instructor files to those they deem necessary in the process of screening candidates for advanced course, or in the course of an investigation of cases involving fraud, deception, misrepresentation of credentials or behavior inconsistent with Training policies or procedures.

2.12 Course Materials/Shipping

2.12.1 Responsibility for bringing course materials to the course and for keeping current with the latest applicable instructor materials rests with the individual instructor candidate.

2.12.2 The Training office may pass on extra shipping charges to those instructor candidates who sign up for a course at the very last minute thereby requiring FedEx or overnight delivery of course materials. *(As adapted from policy approved 3/22/91)*

2.13 Auditing & Observations at Instructor Courses

2.13.1 Only duly registered and paid instructor candidates, RTCs, volunteer assistants to the IT, Master ITs, Training office staff and/or instructor candidates completing a Plan of

Completion or a Plan of Improvement are allowed to take part in or observe a US Sailing instructor course. The Training Office and the IT teaching the course must approve exceptions to this policy prior to the course.

2.13.2 For the purposes of professional development, maintaining a consistent standard across the nation, and for cause the Training Office and Training Committee will from time to time send a representative to observe Instructor Trainers at a Level 1 course. Notice of an observer will typically be made no less than 5 (five) days prior to the course start date. A standardized written evaluation will be submitted in the ITs files at US Sailing, and used as part of the mechanism for determining pay. If observations reveal that an Instructor Trainer's methods and techniques are inconsistent with the goals of the program, the Training Office and Vice-chair of standards and credentials may be notified to rectify concerns.

2.14 Course Cancellation

2.14.1 Should a course be canceled, the Training Office will inform all registered candidates and make every effort to place them in another course. If this is not possible, the candidate may choose from the following options:

- Return course materials and receive a course fee refund minus US Sailing's membership fee.
- Keep course materials and receive a course fee refund minus the retail value of the course materials and US Sailing's membership fee.
- Keep course materials and leave name in an active file in the Training Office until another instructor course is available.

2.15 Testing

2.15.1 The applicable **practical skills tests** are conducted with a pass, fail, plan of improvement or plan of completion result noted.

2.15.2 There are **no exceptions allowed for passing the swim check requirements**. Candidates must show proof of adequate swimming ability.

2.15.2.1 The Training Committee declares that, for purposes of our instructor course swim check, the accepted swim strokes are: front crawl, breaststroke, side stroke, elementary

backstroke, back crawl and butterfly, as defined by the American Red Cross, and that floating and treading water are not considered to be swimming strokes, and that sculling or finning as a way of moving through the water while floating or treading is not considered to be a swimming stroke. *(Approved 4/2/2005)*

2.15.2.2 For Basic Keelboat, Cruising Powerboat and Powerboat Instructor Candidates, all candidates shall submit proof of their ability to swim 50 yards when submitting their application to the course. If a candidate has US Sailing Basic Keelboat Instructor certification issued prior to November 18, 2006 or US Sailing Small Boat Sailing Level 1 Instructor certification or US Sailing Windsurfing Instructor certification, this will suffice as proof. US Sailing will accept swimming certificates issued by the following agencies, or its "Proof of Swimming Ability Verification" form completed and signed by a US Sailing Instructor Trainer, or a swimming instructor certified by one of the following approved agencies or a lifeguard certified by the American Lifeguard Association or US Lifesaving Association *(Approved 11/18/2006)*:

- American Red Cross (its Level 5 certificate is acceptable minimum)
- National Association of Underwater Instructors (NAUI)
- YMCA
- YWCA
- Standards of Training, Certification and Watchkeeping (STCW)
- Professional Association of Diving Professionals (PADI)
- Swim America

2.15.2.3 Small Boat, Sailing Counselor and Windsurfing candidates are required to participate in a swim check at the course.

2.15.3 The passing grade for **written testing** is 80% for each applicable test for that course, unless stated otherwise.

2.15.4 Failure to successfully complete any written or practical testing will result in either a Plan of Improvement, a Plan of Completion or Failure of the course.

2.15.5 Personal and interpersonal practical skills, classroom presentation practical skills, and land and water drill teaching practical skills are evaluated during the course by the Instructor Trainer(s) and that evaluation becomes part of the testing process for instructor certification.

- 2.15.6** It is the Instructor Trainers' final overall evaluation that determines whether or not an instructor candidate successfully passes the course or requires a Plan of Improvement, a Plan of Completion or Failure of the course.
- 2.15.7** If there is a conflict regarding the outcome of participating in an instructor course, the instructor candidate must first contact the Training Office in writing. (Email is acceptable.) The Training Office will investigate the complaint with the Training Chair, Vice Chair of Standards & Credentials and others as appropriate. A report on the findings will be forwarded to the Training Director. The Training Director will inform the instructor candidate of the outcome of the investigation in a timely fashion.

2.16 Plan of Improvement

- 2.16.1** Candidates wishing to complete a Plan of Improvement must contact the Training Office to make arrangements for re-testing or re-evaluation.
- 2.16.2** Plans of Improvement must be completed within 90 days of the conclusion of the course. The Training Director must approve extensions beyond that time. (As approved 3/16/02)
- 2.16.3** The responsibility for completion of a Plan of Improvement rests with the instructor candidate. Instructor candidates will get only one chance to complete their Plan of Improvement. Should they be unsuccessful at this attempt, they will have failed the course and may retake the entire course, at full cost, after one year from the original course date has passed.
- 2.16.4** A Plan of Improvement not completed within a year automatically becomes a failure of the course. (Approved 3/16/02)
- 2.16.5** For grievances regarding a Plan of Improvement see 2.15.7 above.

2.17 Re-Testing for Plans of Improvement (POI)

2.17.1 All re-testing must be completed within 90 days of the conclusion of the course. The Training Director must approve extensions beyond that time. (Keelboat candidates see 2.26.8 on page 20.)

2.17.2 Practical on-water skills re-testing:

- Re-testing can be accomplished by the original IT if he/she so chooses. Should the IT feel it would be inappropriate to do the retesting, another IT can be designated by the Training Office.
- If there is no IT in the candidate's vicinity (i.e., the IT was from out of town) the candidate can request the assistance of the Training Office in locating an IT in their area.
- The re-testing IT should receive a copy of the POI in advance of the re-testing. The candidate shall bring a copy of the POI to the re-testing session.
- Procurement of a boat is the responsibility of the candidate. The boat should be similar to those used in the original course.
- The re-test can be conducted at whatever facility is mutually agreed upon, i.e., the candidate can travel to the IT's location, or the IT can travel to the candidate's location. Any expenses involved, such as boat rental, etc., are the responsibility of the candidate.
- There is a fee for re-testing, plus any travel expenses incurred by the IT. These monies are to be paid directly to US Sailing.
- Notification: the IT will inform the candidate of the results of his/her testing, and will send a report to the Training Office.
- Requests for exceptions to any of the above stipulations must be approved by the Training Director.
- Anyone with a Plan of Improvement for powerboat skills will be required to take a Safe Powerboat Handling course, unless the candidate is remediated by an Instructor Trainer approved by the Training Office. (*Approved 3/13/2004*)

2.17.3 Written exam re-testing:

- 1) Re-testing must be completed within 90 days of the conclusion of the course.
- 2) Re-testing is to be administered in the same manner as the original test, i.e., closed-book and proctored, in an appropriate testing atmosphere (quiet, private).
- 3) Re-testing will be administered by any IT selected by the Training Office. If an IT is not available, another appropriate proctor can serve, such as an RTC, a member of the National Faculty or Training Committee, or other US Sailing official as determined by the Training Director. The proctor will hand-carry the test to the testing site.

- 4) If an instructor candidate fails the primary test, the make-up test may be taken before the end of the course, or the instructor candidate receives a Plan of Improvement to take a make-up test within 90 days. If the instructor candidate fails the make-up test, the instructor candidate fails the course. There is no charge for taking a written make-up test.
- 5) If a Level 1 candidate fails both tests at the course, he/she must retake and pass both tests after a 30 day period has lapsed. If either test is failed the second time, the candidate receives a failure for the course. *(Approved 3/13/2004)*
- 6) An Instructor Candidate should not take a "3rd make-up test" until the Instructor candidate has read and studied the material. *(As adapted from policy approved 10/18/97 from National Faculty recommendations 9/28/97)*

2.17.4 Grading the re-test and notification of results:

- 1) Immediately following completion of the test, the proctor shall mail it to the Training Office for grading. Grading shall be accomplished within 48 hours of receipt of the test.
- 2) The Training Office will provide pass/fail notification to the candidate within 48 hours via phone call or email.
- 3) Requests for exceptions to any of the above stipulations must be approved by the Training Director.

2.18 Plan of Completion/Incomplete Courses

2.18.1 When there is a circumstance whereby the instructor course cannot be completed, a Plan of Completion may be issued by the Instructor Trainer. No certification may be issued without completing the on-the-water practical skills portion. *(Approved 10/19/96 from National Faculty recommendations 9/29/96)*

2.18.2 Candidates wishing to complete a Plan of Completion must contact the Training Office within 90 days of the conclusion of the course to make arrangements. The Training Director must approve extensions beyond that time.

2.18.3 The cost of completion shall be negotiated on a case-by-case basis and shared among the instructor candidates, the host facility and Training. *(Approved 10/19/96 from National Faculty recommendations 9/29/96)*

- 2.18.4** Instructor Trainers shall be compensated at the half-day rate for Plans of Completion as a continuation of current policy. *(Approved 10/19/96 from National Faculty recommendations 9/29/96)*
- 2.18.5** US Sailing is not financially responsible for courses that cannot be completed because of acts of nature or acts of God. *(Approved 10/19/96 from National Faculty recommendations 9/29/96)*
- 2.18.6** A POC that is not completed within a year becomes a failure of the course. A Candidate must retake the entire course at full cost. *(Approved 3/16/02)*

2.19 Failing an Instructor Course

- 2.19.1** Whenever an instructor candidate fails an instructor course outright, the Instructor Trainer(s) must submit a written report with the course paperwork detailing why the instructor candidate failed.
- 2.19.2** After failing a course, an IC must wait a minimum of 9 months before retaking the course at full cost. *(Approved 3/16/02)*
- 2.19.3** For grievances regarding failing an instructor course, see 2.15.7 on page 13.

2.20 Dismissal from Instructor Course

- 2.20.1** Insubordination, sleeping during class, evidence of drunkenness, use of illegal drugs, absenteeism or other inappropriate behavior is grounds for dismissal from an instructor course. The course fee will not be refunded and the candidate will not be allowed to retake an instructor course for a period of one year.

2.21 Small Boat Level 1 Instructor Course-Specific Policies

- 2.21.1** Only 4-day (40 hour) Small Boat Level 1 Instructor Courses will be offered. *(Approved 10/21/95)*

- 2.21.2** Regular course size is set at 8-12 instructor candidates. *(As adapted from policy approved 1/28/90)* The minimum number of participants for an in-house course is four. *(Approved 3/13/2004)*
- 2.21.3** Instructor Trainers make the decision on accepting additional students to a course which would then bring the course total to between 13-15 instructor candidates. *(As adapted from policy approved 1/28/90)*
- 2.21.4** The ratio of instructor candidates to Instructor Trainer shall not exceed 15:1 or the course will require two Instructor Trainers.
- 2.21.5** Sixteen candidates in a course is considered a double course and requires 2 Instructor Trainers. *(As adapted from policy approved 1/28/90)*
- 2.21.6** RTCs cannot exceed 12 participants per instructor course without the explicit approval of the IT. *(As adapted from policy approved 1/28/90)*
- 2.21.7** The Instructor Trainer will receive the appropriate current fee for teaching 8-12 candidates assuming all course paperwork is received in the Training Office in a timely manner and is complete. *(As adapted from policy approved 1/28/90)*
- 2.21.8** No additional teaching fee is paid to an IT for agreeing to teach 13-15 candidates in an instructor course. *(As adapted from policy approved 1/28/90)*
- 2.21.9** The Small Boat Level 1 Instructor and Small Boat Level 2 Coach courses should not discriminate or differentiate between dinghy and multihull boats. *(As approved 03/18/95)*
- 2.21.10** All SB Level 1 Instructor courses MUST have at least 1 capsizable dinghy or multihull. An ideal course would have examples of dinghies, keelboats, multihulls and prams. *(As approved 10/18/97 from NatFac Recommendations 9/28/97)*
- 2.21.11** US Sailing requires capsize-recovery of SB Level 1 instructor candidates and recommends the scoop method as the preferred technique. *(Approved 10/18/97 from NatFac recommendations 9/28/97)*
- 2.21.12** For a SB Level 1 Instructor Candidate to participate in the operation of and evaluation in a powerboat, the Instructor Candidate is required to hold a NASBLA safe boating certificate. *(As approved October 22, 2005)*

- 2.21.13** An IT wishing to conduct a semester long SB Level 1 Instructor Course may submit an application with course syllabus for approval by the Training Committee. *(As approved March 18, 2006)*
- 2.21.14** It is the Training Committee's intent to require that Safe Powerboat Handling certification be a prerequisite to attending the SB Level 1 Instructor Course by 2008. *(As approved March 18, 2006)*
- 2.21.15** Instructor Trainers are encouraged to communicate with their prospective candidates in advance of the course providing course details such as when/where to meet, lunch arrangements, equipment/clothing requirements and any other information they will need to successfully prepare for the course.

2.22 In-House Small Boat Level 1 Instructor Course Specific Policies

- 2.22.1** With the exception of military programs, in-house courses must be taught by the IT on staff at the course location, or by an unpaid IT volunteer approved through the Training Office. *(As approved 10/21/95)*
- 2.22.2** The normal SBS Level 1 course maximum of 16 or more candidates will require two Instructor Trainers. The minimum number of participants for an in-house course is four. *APPROVED 3/13/2004*
- 2.22.3** The Small Boat Sailing Level 1 Instructor (in-house) course may be administered to paid or volunteer sailing instructors for that (host) program. This should not be interpreted to mean any "volunteer" or member of that organization.
- 2.22.4** Instructor candidates who are NOT employees of the in-house hosting organization but wish to attend an in-house course may only do so with approval from the Training Office and the Instructor Trainer on site. Those candidates are expected to pay the full "regular" course fee and can only be considered for inclusion to the in-house course if there is no other option for taking a regularly scheduled course in their area and if they are not displacing a candidate from the host course site.

2.22.5 Any exceptions due to size of the course or hardship due to time constraints or travel restrictions on the part of a participant must be approved in advance by the Training Director.

2.22.6 There is a reduced course fee, payable prior to the course.

2.23 Sailing Counselor Course-Specific Policies

2.23.1 The Sailing Counselor course is a two-day course.

2.23.2 **The minimum age for attending a Sailing Counselor course is 14**, subject to state and local laws, and providing the minor child candidate and a parent/guardian sign a Statement of Understanding for a Minor Candidate prior to the start of the course. *(As approved 10/20/01)*

2.23.3 Each Sailing Counselor course must have a minimum of 8 participants with the maximum for the course set at 12. Exceptions must be approved by the Training Director.

2.23.4 There is a course fee, payable prior to the course.

2.23.5 The Instructor Trainer will be paid for teaching the 2-day course and a local IT will be sought to save on transportation costs.

2.23.6 A \$25 credit toward the cost of the Small Boat Sailing Level 1 Instructor course is available to individuals who successfully pass the Sailing Counselor course and are at least 16 years old. This credit would expire after three years.

2.24 Small Boat Level 2 Coach Course-Specific Policies

2.24.1 The Small Boat Level 2 Coach course is held over two consecutive days.

2.24.2 Coach candidates must hold current Small Boat Level 1 Instructor or Sailing Assistant certification for over 9 months prior to attending the Small Boat Racing Level 2 Coach course. Exceptions granted only by the Training Office. *(As approved 10/19/96 from NatFac recommendations 9/29/96)*

- 2.24.3** If the coach candidate is under the age of 18, one season of experience as a US Sailing Small Boat Sailing Level 1 "Sailing Assistant" is required.
- 2.24.4** To attend a US Sailing coach course, the coach candidate must be at least 17 years old. Upon successful completion of a coach course, the 17 year old will be designated a Sailing Assistant until turning 18. The Training Office may be then contacted to obtain a coach's certification card.

2.25 Powerboat Instructor Course-Specific Policies

- 2.25.1** The Powerboat Instructor course is a 3-day course for instructor candidates to become certified to teach Safe Powerboat Handling and Safety & Rescue Boat Handling certification courses and the Race Support Boat Endorsement course (*Updated and approved 3/13/2004, 11/18/2006*). **2.25.2** Class size is limited to 6-8 candidates. A standard course has a maximum of 8 Instructor Candidates. Any variance of fewer than 6 or up to 10 candidates must be approved in advance by the Training Director in consultation with the Instructor Trainers. The recommended number of candidates per boat is 2-3, not to exceed 4. (*Updated and approved 11/18/2006 and 10/27/2007*)
- 2.25.3** Instructor candidates shall be 18 years old on or before the first day of the course, with no exceptions.
- 2.25.4** A course fee and US Sailing membership are required for certification.
- 2.25.5** All candidates for the Powerboat Instructor course must have a Safe Powerboat Handling certification. Safety and Rescue Boat Handling Certificate and Race Support Boat endorsement are not required. (*As adapted from policy approved 3/13/2004 and amended 10/23/2004*)
- In special circumstances, the Safe Powerboat Handling certification requirement may be waived at the discretion of the Training Director. *Approved 11/18/2006*
- 2.25.6** Instructor candidates are expected to hold a current U.S. Coast Guard license if operating in conditions where a license is required.
- 2.25.7** The standard requirement for a Powerboat instructor course is one IT per course. *Approved 10/27/2007 (This is a change to previous standard: Two Powerboat Instructor Trainers are required to teach Powerboat Instructor courses. Both Instructor Trainers must agree to pass or fail an instructor candidate.)*

2.26 Level 1 Windsurfing Instructor Course-Specific Policies

- 2.26.1** The Level 1 Windsurfing Instructor course follows a four-day format consisting of 36 to 40 hours of instruction, evaluation and testing.
- 2.26.2** The recommended number of candidates for a Windsurfing instructor course is a minimum of 4 candidates and a maximum of 8. Any variance of fewer than 4 or up to 10 candidates may be permitted at the discretion of the Instructor Trainer in cooperation with the Training Office.
- 2.26.3** Candidates are expected to demonstrate advanced windsurfing skills including rigging, de-rigging, general board handling, and maneuvering and leaving and returning to a dock or beach. Additionally, candidates should have intermediate to advanced knowledge of windsurfing related subjects such as theory, no-go zone, points of sail, etc. (in addition to US Sailing's Minimum Water Skills for the Basic Windsurfing card.)
- 2.26.4** Each instructor candidate is expected to bring an appropriate sailboard and equipment in keeping with basic instruction. These include:
- 1) Regular recreational board (without foot straps) with a rig suitable for basic maneuvers.
 - 2) Suitable clothing including footwear, appropriate to the weather and water conditions. The condition of the clothing and equipment should be what is expected of a qualified instructor.
 - 3) Other equipment should include an approved life jacket (PFD), tow- rope, whistle and knife/marlinspike.

2.27 Basic Keelboat Instructor Course-Specific Policies

- 2.27.1** The Basic Keelboat Instructor Course is a 3-day evaluative course. *(As approved 10/21/95)*
- 2.27.2** Instructor candidates for Basic Keelboat must be 18 at the time of the course. No exceptions.
- 2.27.3** The course minimum is 8 candidates; the course maximum is 12 candidates.

- 2.27.4** Two Keelboat Instructor Trainers are required to teach Keelboat Instructor courses. This provides moderation in the evaluative process, i.e. both ITs must agree to pass or fail an instructor candidate. *(As approved 10/19/96 from NatFac recommendations 9/29/96)*
- 2.27.5** A reduction in the course fee is offered to Basic Keelboat Instructor candidates whose applications are received by the Training Office with payment prior to 21 days before the course date. *(As approved 10/18/97 from NatFac recommendations 9/28/97)*
- 2.27.6** This applies to all Keelboat Instructor courses: In the event of a course cancellation, the course fee will be applied to registration in a future course. For cancellations within a 4-week deadline, one-half of the registration fee will be applied toward a future course date (US Sailing reserves the right to cancel an instructor course, in which case, the course fee will be refunded.)
- 2.27.7 Completion of a Plan of Improvement** must be arranged through the Training Office. The responsibility for completion of a Plan of Improvement rests with the instructor candidate. Instructor candidates will get only one chance to complete their Plan of Improvement. Should they be unsuccessful at this attempt, they will have failed the evaluation and may retake the entire course, at full cost, after one year has passed from the original course date. There is a fee for completing a Plan of Improvement.
- 2.27.8 Failure of Written Tests:** When an IC fails the primary test, the make-up test may be taken before the end of the course or the IC receives a Plan of Improvement to take a make-up test within 90 days. If the IC fails the make-up test, the IC fails the course. If a candidate fails the course, the IC must wait a minimum of 9 months from the original course before attending another course. There is no charge for taking a written make-up test. *(Approved 10/19/96 from NatFac recommendations 9/29/96)*

2.28 One-Day Basic Keelboat Instructor Evaluation

(As approved 10/20/01)

2.28.1 Course requirements

- 1) A nomination from a US Sailing school testifying to the IC's experience, skill level and familiarity with US Sailing standards and practices. This nomination should be co-signed by the IC's immediate supervisor.
- 2) Instructor candidates must be 18 at the time of the course. No exceptions. The one-day course will take a total of 7.5 hours.

- 3) The general descriptions and policies for US Sailing instructor courses, as applicable, apply to the pilot program.

2.28.2 Structure of Evaluation:

- 1) The evaluation will be conducted with one IT and one IC only.
- 2) There will be no opportunity provided for the IC to practice.
- 3) The IC should be prepared to complete all tests at any time and in any order assigned by the IT.
- 4) Standards for passing and failure will be the same as for the standard three-day evaluative course.
- 5) Plan of Improvements may only be satisfied by passing the complete three-day evaluative course.

2.28.3 Pilot Program Guidelines:

- 1) The evaluation must be conducted by an IT not employed by the IC's school and must be designated by the Training Office. The sponsoring school is expected to take the initiative and responsibility for preparing the IC and making arrangements with the Training Office.
- 2) All sites, boats and schedules must be approved in advance by the Training Office.
- 3) All travel costs for the IT will be borne by the sponsoring school.
- 4) In the event a school wishes to send an IC to another site, the sponsoring school would be responsible for all expenses for both the IC and the IT.
- 5) Care should be taken to avoid having an IT conduct repeated evaluations at the same school.
- 6) Sponsoring schools are expected to send only their best and well-prepared candidates.
- 7) The Training Office may, at any time, suspend the ability of a school to nominate IC's using this format if it feels the school is not doing an adequate job of screening IC's.
- 8) A Plan of Completion for weather would require an additional fee.

2.29 Pilot Program for a Two-Day Basic Keelboat "Short Course" Instructor Evaluation

(As approved 2/8/2007)

2.29.1 Course requirements:

- 1) A nomination from a US Sailing school testifying to the IC's experience, skill level and familiarity with US Sailing standards and practices. This nomination should be co-signed by the IC's immediate supervisor.

- 2) Instructor candidates must be 18 at the time of the course. No exceptions.
- 3) The two-day course will take a total of 15 hours.
- 4) The general descriptions and policies for US Sailing instructor courses, as applicable, apply to the pilot program.

2.29.2 Structure of Evaluation:

- 1) The evaluation will be conducted with one IT.
- 2) There will be no opportunity provided for the ICs to practice.
- 3) The ICs should be prepared to complete all tests at any time and in any order assigned by the IT.
- 4) Standards for passing and failure will be the same as for the standard three-day evaluative course.
- 5) Plan of Improvements may only be satisfied by passing the complete three-day evaluative course.

2.29.3 Pilot Program Guidelines:

- 1) The evaluation must be conducted by an IT not employed by the host school and must be designated by the Training Office.
- 2) All sites, boats and schedules must be approved in advance by the Training Office.
- 3) Care shall be taken to avoid having an IT conduct repeated evaluations at the same school.

2.30 Cruising & Coast Navigation Instructor Course-Specific Policies

2.30.1 The Cruising and Coastal Navigation Instructor course is a 3-day course for experienced Basic Cruising, Bareboat Cruising and Coastal Navigation Instructors.

2.30.2 The recommended number of candidates per boat is 4 instructor candidates and 1 Instructor Trainer. Candidates will live and sail aboard their assigned boats.

2.30.3 To be considered for certification, a candidate must already hold current US Sailing Basic Keelboat Instructor certification and a U.S. Coast Guard license. (The other course prerequisites are included in the Prerequisites and Information sheets describing the course.)

2.30.4 Coastal Navigation Instructors must stay an extra half day for an additional comprehensive written exam or take the Coastal Navigation test separately through prior arrangement with the Keelboat Program office (at an additional charge).

2.31 Celestial Navigation Instructor Course-Specific Policies

2.31.1 The following is required for appointment as a Celestial Navigator instructor: (a) BKI certification, (b) CoNav instructor certification, (c) passing the CelNav written test, and (d) submission of celestial navigation log. *(As approved 10/19/96 from NatFac recommendations 9/29/96)*

2.32 Coastal Passage Making Instructor Course-Specific Policies

2.32.1 The Coastal Passage Making Instructor course is a 5-day evaluation for experienced Passage Making Instructors.

2.32.2 The recommended number of candidates per boat is 4 instructor candidates and 1 Instructor Trainer. Candidates will live and sail aboard their assigned boats.

2.32.3 Cruising and Coastal Navigation Instructor certification are the prerequisites for enrolling in a Coastal Passage Making course/evaluation where on-the-water navigational skills will be evaluated. *(As approved 10/19/96 from NatFac recommendations 9/29/96)*

2.32.4 The minimum age for a Coastal Passage Making Instructor Candidate is 21 years old.. *(As approved 3/13/2004 from NatFac recommendations)*

2.33 Equivalency Method for Certification Passage making Instructors

2.33.1 CPM instructor certification may be issued for a current Yachtmaster Instructor meeting the following conditions:

- 1) Pass US Sailing (a) Coastal Navigation test, (b) Cruising Instructor test, and (c) CPM instructor test.
- 2) Two hours of training with US Sailing instructor or IT on US Sailing structure and policies.
- 3) Thirty days of documented sea time in US coastal waters.
- 4) USCG license where applicable
- 5) Current (a) US Sailing membership, (b) CPR and First Aid certification
- 6) Approval by panel appointed by Training Director *(As approved 10/19/96 from NatFac recommendations 9/29/96)*

2.34 Cruising Powerboat Instructor Course-Specific Policies

(Approved 11/18/2006)

- 2.34.1** The Cruising Powerboat Instructor course is a three- to four-day course for instructor candidates to become certified to teach Basic Powerboat Cruising and Inshore Powerboat Cruising certification courses and the Night Operation Endorsement course.
- 2.34.2** Class size is limited to 8 candidates, with special exceptions as approved by the Training Director in consultation with the Instructor Trainers. The recommended number of people per boat is 4 instructor candidates and 1 Instructor Trainer. Candidates will live aboard their assigned boats.
- 2.34.3** Instructor candidates shall be 18 years old on or before the first day of the course with no exceptions.
- 2.34.4** Instructor candidates shall hold a current U.S. Coast Guard license. Other course prerequisites are described in the Cruising Powerboat Certification Standards booklet.
- 2.34.5** Two Cruising Powerboat Instructor Trainers are required to teach Cruising Powerboat Instructor courses.
- 2.34.6** Two cruising powerboats, a single-screw and a twin-screw, are required for the course. Bow thrusters are optional.
- 2.34.7** Coastal Navigation instructor candidates must stay an extra half-day for an additional comprehensive written exam or take the Coastal Navigation test separately through prior arrangement with the Training Office.

3. INSTRUCTOR POLICIES

3.1 Instructor Certification

3.1.1 US Sailing Instructor certification can only be granted at valid US Sailing Instructor courses taught by currently certified US Sailing Instructor Trainers.

3.1.2 To achieve instructor certification, an instructor candidate must:

- 1) Attend a course in its entirety
- 2) Successfully complete all portions of the course, including all practical, written and skill testing, and the Instructor Trainer's evaluation
- 3) Hold current US Sailing membership
- 4) Hold current approved First Aid/CPR cards
- 5) Possess all relevant required skills and licenses

3.1.3 Upon successful completion of a US Sailing Instructor course, instructors will be given a US Sailing Instructor certification card and a sticker denoting the type and level of certification achieved. The sticker can be inserted in a *US Sailing Official Logbook of Sailing*.

3.1.4 US Sailing Instructor certification is valid for three years from the date of the successful completion of a course.

3.1.5 Should an instructor receive a subsequent certification within the three years of the usual certification period, the three-year term of the earlier certification is changed to correspond to the term of the subsequent certification. *(As approved 10/19/96 from National Faculty recommendations)*

3.1.6 Cross Certification of Instructors - To encourage existing instructors to cross-certify in the area of their choice, the course fees for instructors cross-certifying on the beginning level in another path would be reduced. To promote the interaction between skill sets necessary for adequate training, no more than 25% of any class can be instructors attempting to cross-certify and on a course availability space availability basis. *(As approved 3/25/2000)*

3.2 Sailing Assistants

- 3.2.1** Instructor candidates who successfully complete a US Sailing Level 1 Instructor course or a US Sailing Level 2 Coach course but are not 18 at the time of the course will be designated Sailing Assistants until such time that they turn 18. Sailing Assistants are expected to maintain current US Sailing adult membership and currently approved First Aid and CPR.
- 3.2.2** Sailing Assistants completing the process to full Instructor certification will hold that certification for the remainder of 3-years from the date of the original course. Recertification can then be sought.

3.3 Instructor Code of Conduct

- 3.3.1** Instructors have a responsibility to students to monitor their progress and ensure they are given sound basic instruction in a safe, creative and fun environment. *(As adapted from policy approved 01/29/83)*
- 3.3.2** Instructors have a responsibility to employers to work towards the stated aims of the instructional program, treating students, staff and the program's property and equipment with respect. *(As adapted from policy approved 01/29/83)*
- 3.3.3** Instructors have a responsibility to US Sailing to represent the organization and the Training Program in a positive way and to present themselves as role models and emissaries for the sport, exhibiting professional conduct, ethical and responsible behavior and sportsmanship on and off the water.
- 3.3.4** Instructors are expected to uphold and comply with US Sailing standards and policies for instructors.

3.4 Recertification

- 3.4.1** US Sailing instructors who have taught at least one course within the three years of their certification, but have not allowed their certification to expire, are eligible for recertification for an additional three years. A course is defined as a US Sailing course as meets the standards and requirements for the level of instructor recertification being sought.

- 3.4.2** Instructors are only required to re-certify at the highest level of certification they have achieved within each program. (i.e., if the instructor holds Basic Keelboat and Cruising Instructor certifications, he/she only needs to renew the Cruising Instructor Certification. If the instructor holds Cruising Instructor and Level 2 Coach certifications, he/she needs to renew both.)
- 3.4.3** US Sailing Instructor recertification can be accomplished by returning to the Training Office the latest recertification form completed in full, along with the current recertification fee. Copies of current FA/CPR cards and US Sailing membership are also required. Recertification will be for three years. *(As adapted from policy approved 1/24/93 and updated in 10/19/96)*
- 3.4.4** **Instructors who have allowed their certification to lapse up to 6 months** past the card expiration date can recertify through the normal recertification process.
- 3.4.5** For Levels 1 and 2, an individual who has passed at any given time may take and pass a written test and pay the recertification fee, and they will be reissued their certification card. *(Approved 10/27/2007. This is a change to previous policy: Instructors who have allowed their certification to lapse beyond 6 months will require review and possible re-testing prior to being considered for recertification. The Training Director and the Training Committee Vice Chair of Standards & Credentials will make the final determination regarding recertification in these cases. It is entirely possible the instructor will be required to re-take the instructor course.)*
- 3.4.6** **Keelboat Instructor Recertification** - Current policy states that instructor certification is good for three years from date of certification. Contact the Training Office for forms and the latest recertification fee.

3.5 Withdrawal of Instructor Certification

- 3.5.1** **Grounds for Instructor Decertification** are as follows:
- 1) Awarding certification to individuals who do not meet the performance indicators of the standard.
 - 2) Failure to uphold US Sailing standards and policies as set by the Training Committee and US Sailing.
 - 3) Operating vessels or conducting teaching activities in an unsafe manner where safety is defined by current US Sailing policies or government regulations.
 - 4) Misuse of instructor cards, stickers, logbooks, certificates and/or tests.

5) Unprofessional conduct, criminal acts such as fraud, substance abuse, etc.

3.5.2 Instructor certification may be revoked by the Training Committee Chair on recommendation of the Vice Chair of Standards & Credentials and the Training Director for violation of US Sailing Training Program policy. The process for handling complaints and decertification is:

- 1) All complaints must be made in writing to the Training Director, the Vice Chair of Standards & Credentials and the Training Committee Chair.
- 2) Third party complaints will not be considered except in unusual circumstances.
- 3) The Training Director and the Vice Chair of Standards & Credentials will review complaints received in writing and not resolved within a reasonable time by parties to the complaint.
- 4) The Training Director will send the instructor a warning that his/her activities are under review and at that time the Training Director may make a recommendation to the Vice Chair of Standards & Credentials and the Training Committee Chair to decertify the instructor.
- 5) The Vice Chair of Standards & Credentials will write a report regarding the complaint. The report will be sent to the instructor, the Training Committee Chair and the Training Director and any other individual that the Vice Chair deems necessary. The instructor will be given the opportunity for rebuttal.
- 6) Instructors may be decertified or may not be invited to recertify by failing to adhere to the "Code of Conduct" set by US Sailing as the standard for instructors.

3.5.3 An instructor seeking reinstatement of instructor certification must apply in writing to the Training Director.

4. GENERAL POLICIES FOR INSTRUCTOR TRAINER COURSES

4.1 Program Description

- 4.1.1** The US Sailing Instructor Trainer Training Program certifies qualified US Sailing Instructors to conduct courses to train and/or certify instructors/coaches from entry level to international competition or passage making levels.
- 4.1.2** Instructor Trainer courses are conducted by Master Instructor Trainers, experts in the field of training for their discipline.
- 4.1.3** The areas covered during an Instructor Trainer Course include practical boating skills demonstrations as applicable to the certification, communicative and interpersonal skills, team building techniques, sports psychology/physiology, development of training aids, evaluation techniques, video-tape feedback on teaching styles, lesson/program planning, record keeping, problem solving skills, marketing and legal concerns, required paperwork, policies and procedures for conduct of instructor courses, and policies for Instructor Trainers.

4.2 Goals of the Instructor Trainer Program

- 4.2.1** The goals of the Instructor Trainer Program are:
 - 1. To train professionals in the methods and theories of the US Sailing Instructor Training Program
 - 2. To provide Instructor Trainer candidates with the information, tools, and confidence to conduct a successful instructor course.

4.3 Instructor Trainer Course Varieties

- 4.3.1** The Instructor Trainer Course Training Program consists of 8 different comprehensive Instructor Trainer courses or certification processes:
 - 1. Small Boat Level 1 Instructor Trainer – a four-day (40+ hour) course for highly skilled, qualified US Sailing Small Boat Level 1 Instructors experienced in teaching dinghy/multihull/daysailing keelboat sailors.

2. Small Boat Level 2 Coach Trainer – a four-day (40+ hour) course for Small Boat Level 1 Instructor Trainers who are experienced in teaching racing techniques, the rules, ethics, drills and performance sailing skills.
3. Windsurfing Instructor Trainer – Windsurfing Instructor Trainer candidates attend a four-day Windsurfing Instructor course along with windsurfing instructor candidates and a Windsurfing Master Instructor Trainer. The Windsurfing Instructor Trainer candidate is required to co-teach, evaluate instructor-level skills and performance, and demonstrate professional-level sailing and teaching skills themselves. To be eligible for consideration as a Windsurfing IT candidate, the candidate must have held US Sailing instructor certification for at least one year. Written testing is also part of the certification process.
4. Basic Keelboat Instructor Trainer – a four-day (40+ hour) course for highly skilled, qualified US Sailing Basic Keelboat Instructors experienced in teaching beginning sailing in a keelboat.
5. Cruising and Coastal Navigation Instructor Trainer – candidates for Cruising and Coastal Navigation Instructor Trainer certification must already hold current US Sailing Basic Keelboat Instructor certification and Cruising and Coastal Navigation Instructor certification. Instructor Trainer candidates are required to attend a Cruising and Coastal Navigation Instructor course where they will serve as a third Instructor Trainer (the Cruising and Coastal Navigation Instructor course requires 2 Instructor Trainers). Successful completion is based on demonstrating exceptional practical and evaluative skills as well as outstanding people skills. Candidates for Cruising and Coastal Navigation Instructor Trainer do not receive pay for participating in the Cruising and Coastal Navigation Instructor course.
6. Coastal Passage Making Instructor Trainer – candidates for Coastal Passage Making Instructor Trainer must already hold current US Sailing Basic Keelboat Instructor certification and Cruising and Coastal Navigation Instructor Trainer certification along with successful completion of the Coastal Passage Making Instructor course. Candidates for Coastal Passage Making Instructor Trainer must follow a similar procedure as that described above for Cruising and Coastal Navigation Instructor Trainer.
7. Powerboat Instructor Trainer – highly skilled, qualified US Sailing Powerboat Instructors who are experienced in teaching on-the-water, skills-based powerboat operator courses can become certified Powerboat Instructor Trainers by successfully completing one of the following certifying options:

- 1) Attend a Powerboat Instructor course where they will serve as an apprentice Instructor Trainer with an experienced US Sailing Powerboat Instructor Trainer who is qualified to train and evaluate apprentice Instructor Trainers. Candidates do not receive pay for participating as an apprentice Instructor Trainer.
 - 2) Attend a three- to four-day Powerboat Instructor Trainer course conducted by two US Sailing Powerboat Master Instructor Trainers.
8. Cruising Powerboat Instructor Trainer – highly skilled, qualified US Sailing Cruising Powerboat Instructors who are experienced in teaching hands-on, on-the-water US Sailing/US Powerboating cruising powerboat operator courses can become certified Cruising Powerboat Instructor Trainers by successfully completing one of the following certifying options:
- 1) Attend a Cruising Powerboat Instructor course where they will serve as an apprentice Instructor Trainer with an experienced US Sailing Cruising Powerboat Instructor Trainer who is qualified to train and evaluate apprentice Instructor Trainers. Candidates do not receive pay for participating as an apprentice Instructor Trainer.
 - 2) Attend a three- to four-day Cruising Powerboat Instructor Trainer course conducted by two experienced and highly skilled US Sailing Cruising Powerboat Master Instructor Trainers.

4.4 Instructor Trainer Certification

- 4.4.1** US Sailing Instructor Trainer certification can only be granted at a valid US Sailing Instructor Trainer course taught by two currently certified US Sailing Master Instructor Trainers.

Cruising, Coastal Passage Making, Powerboat or Cruising Powerboat Instructor Trainer certification can also be achieved by successful apprenticeship at the relevant instructor course(s) under the supervision and evaluation of a currently certified, experienced US Sailing Instructor Trainer qualified to train and evaluate apprentice Instructor Trainers.

- 4.4.2** To achieve Instructor Trainer certification at an Instructor Trainer course, an Instructor Trainer candidate must:
- 1) Attend a course in its entirety
 - 2) Successfully complete all portions of the course, including all practical, written and skill testing and the Master Instructor Trainers' evaluation
 - 3) Hold current US Sailing membership

- 4) Hold current First Aid/CPR cards
- 5) Possess all relevant required skills and licenses

4.4.3 Instructor Trainer certification achieved through apprenticeship at the relevant Instructor course(s) requires:

- 1) Attend the course in its entirety
- 2) Successfully demonstrate exceptional practical, knowledge and evaluative skills as well as outstanding people skills
- 3) Receive an evaluation from the Instructor Trainer recommending certification without any qualifications or additional apprenticeship
- 4) Hold current US Sailing membership
- 5) Hold current First Aid/CPR card
- 6) Possess all relevant required skills and licenses

4.4.4 Upon successful completion of a US Sailing Instructor Trainer course or apprenticeship, ITs will be sent a certification package including a US Sailing Instructor Trainer certification card.

4.5 Course Scheduling

4.5.1 Instructor Trainer courses are generally scheduled once per year. Windsurfing and the upper levels of Keelboat Instructor Trainer are dependent on qualified candidates desiring further advancement within the Training Program. They may go through the certification process as individuals rather than in an Instructor Trainer course. The Training Office and the appropriate Master Instructor Trainers develop dates and locations for courses.

4.5.2 A staff person (the Training Director or appropriate staff person as selected by the Training Director) must be present at all introductory Instructor Trainer courses. This would include the Small Boat Sailing Instructor Trainer course and the Basic Keelboat Instructor Trainer course. The role of a staff person as a presenter, administrative aide and evaluator is invaluable when dealing with first-time Instructor Trainer candidates.

4.6 Application & Selection Process

- 4.6.1** Previous Certification Requirements - All Instructor Trainer candidates must hold current instructor certification correlating to the IT apprenticeship or course they wish to attend prior to applying and attending an Instructor Trainer course or applying as an apprentice at an instructor course. *(As adapted from policy approved 1/28/90)*
- 4.6.2** All appropriate application forms must be filled out in their entirety and signed by the IT candidate. An approved form of payment must accompany the course application.
- 4.6.3** Decisions relating to the timeliness of IT course or apprenticeship applications received in the Training Office and whether a late fee or extra shipping expense applies are at the discretion of the Training Director. *(As approved 10/19/96 from NatFac recommendations 9/29/96)*
- 4.6.4** Submitting a completed Instructor Trainer course application does not ensure acceptance to an Instructor Trainer course or apprenticeship.
- 4.6.5** Candidate's applications will be reviewed by the Training Director, the Vice Chair of Standards & Credentials and the Master Instructor Trainers. It is likely that references will be checked along with current or recent employers and the candidate's Instructor Trainer from his/her instructor course.
- 4.6.6** Candidates will be informed of their acceptance to a course or apprenticeship by the Training Office in a timely fashion. Those not selected for a particular course or apprenticeship will also be informed in a timely fashion and given options for future consideration.
- 4.6.7** US Sailing retains the right to refuse entry to an Instructor Trainer course or apprenticeship to anyone whose behavior and attitude appears contrary to those of a professional, open-minded, positive and enthusiastic Instructor Trainer.

4.7 Instructor Trainer Course or Apprenticeship Prerequisites

- 4.7.1** For Previous Certification Requirements see 4.6.1.
- 4.7.2** Instructor Trainer candidates should have at least three years teaching experience in an approved hands-on, on-the-water training program applicable to the certification.

Exceptions to this requirement may be granted if the candidate has taught three years outside the sailing/boating environment and possesses appropriate skills-based experience to transfer these teaching skills to sailing or powerboating.

- 4.7.3** A high level of interpersonal, teaching, appropriate sailing and/or powerboat skills is expected. Instructor Trainer candidates should be competent in any boat (within their range of instruction) in any situation.
- 4.7.4** Candidates should hold any boat operator certification or licensure required by their state's boating laws and regulations, and be familiar with those laws and regulations
- 4.7.5** Candidates should hold current approved First Aid and CPR as well as current US Sailing adult individual or family membership and any other certifications or licenses as appropriate. This includes a current U.S. Coast Guard license for Powerboat, Cruising Powerboat, Cruising and Coastal Passage Making Instructor Trainer candidates.
- 4.7.6** Course prerequisites also include submission of the names of two references that are familiar with the candidate's recreational activities covering appropriate sailing and/or powerboating, teaching and general employment.
- 4.7.7** Successful completion of a background screening program is required for any Instructor Trainer certification.

4.8 Age Requirements for Attendance & Certification

- 4.8.1** Suggested minimum age is 24 years old. Consideration will be given to younger candidates depending upon experience, training and teaching ability.

4.9 Attendance

- 4.9.1** Instructor Trainer candidates must attend an Instructor Trainer course in its entirety to be considered for certification. Arriving late or missing a portion of a day may result in a Plan of Improvement. Missing a whole day will result in a Plan of Improvement or Failure of the course. This policy also applies to Instructor Trainer candidates who are apprenticing at an instructor course.
- 4.9.2** Should an Instructor Trainer candidate leave or drop out of an Instructor Trainer course, the course fee is non-refundable.

4.10 Confidentiality

4.10.1 Course paperwork consisting of the original course application form, letters of reference, self-evaluation sheets, all written evaluations whether noting written or practical test results, and any remarks reported in writing by the Master Instructor Trainer(s) to the Training Office is confidential and as such is not generally available for inquiries. Requests by an Instructor Trainer candidate to see course paperwork involving their participation should be directed to the Training Director. *(As approved 10/21/95)*

4.11 Course Materials/Course Preparation

4.11.1 Responsibility for bringing course materials to the course and for completing any pre-course preparation as requested by the Master Instructor Trainer(s) rests with the individual Instructor Trainer candidate. Failure to thoroughly prepare for a course may result in a Plan of Improvement or Failure of the course.

4.12 Auditing an Instructor Trainer Course

4.12.1 Only duly registered and paid Instructor Trainer candidates, RTCs, volunteer assistants to the Master ITs, Training office staff and Instructor Trainer candidates completing a Plan of Completion or a Plan of Improvement are allowed to take part in or observe a US Sailing Instructor Trainer course. The Training Office and the Master IT(s) teaching the course must approve exceptions to this policy prior to the course.

4.13 Course Cancellation

4.13.1 Should a course be cancelled, the Training Office will inform all registered candidates as soon as possible. Instructor Trainer candidates may choose from the following options:

- 1) Return course materials and receive a course fee refund minus US Sailing's membership fee.
- 2) Keep course materials and leave name in an active file in the Training Office until another Instructor Trainer course is available.

4.14 Testing

- 4.14.1** Failure to successfully complete any written or practical skills testing or evaluation will result in either a Plan of Improvement, a Plan of Completion or Failure of the course.
- 4.14.2** Personal and interpersonal skills, classroom presentations, appropriate sailing and/or powerboat practical skills, and land drill and water drill teaching practical skills are evaluated during the course by the Master Instructor Trainer(s) and that evaluation becomes part of the testing process for Instructor Trainer certification. Powerboat and Cruising Powerboat Instructor Trainer candidates are not required to have sailing skills.
- 4.14.3** It is the Master Instructor Trainers' final overall evaluation that determines whether or not an Instructor Trainer candidate successfully passes the course or apprenticeship or requires a Plan of Improvement, a Plan of Completion or Failure of the course.

4.15 Plan of Improvement (POI)

- 4.15.1** Instructor Trainer candidates wishing to complete a Plan of Improvement must contact the Training Office to make arrangements for re-testing or re-evaluation.
- 4.15.2** It is recommended that Plans of Improvement be completed within 90 days of the conclusion of the course or evaluation if at all possible. Extensions beyond that time, of up to one year from the conclusion of the Instructor Trainer course or evaluation, must be approved by the Training Director and the Vice Chair of Standards & Credentials.

4.16 Re-Testing for Plans of Improvement (POI)

- 4.16.1** Re-testing for Plans of Improvement that require the active participation of a Master IT or a pre-selected Instructor Trainer to evaluate on-the-water testing or evaluation may carry a fee.
- 4.16.2** Written exam re-testing:
- 1) Re-testing must be accomplished within ninety days of the conclusion of the course.
 - 2) Re-testing is to be administered in the same manner as the original test,
 - 3) i.e., closed-book and proctored, in an appropriate testing atmosphere – (quiet/private)

- 4) Re-testing can be administered by any IT selected by the Training Office. If an IT is not available, another appropriate proctor can serve, such as an RTC, a member of the National Faculty or Training Committee, or other US Sailing official as determined by the Training Director. The test is to be provided to the proctor, who will hand-carry it to the test site. See 2.17.5 for grading & notification details.

4.16.3 Failure to pass either a written or practical skills re-test will result in failure of the course. Instructor Trainer candidates are required to wait one year before re-applying to another Instructor Trainer course.

4.17 Plan of Completion/Incomplete Courses

4.17.1 The Training Office will work with the Master Instructor Trainer(s) to re-schedule the remainder of the Instructor Trainer course. Every effort will be made to complete the course within a reasonable time. There is the possibility of additional cost to the candidates to cover site, boat or other extraneous expenses.

4.17.2 An Instructor Trainer Candidate who does not complete a Plan of Completion (POC) within a year fails the course. (As approved 3/16/02)

4.18 Failing an Instructor Trainer Course or Apprenticeship Evaluation

4.18.1 Whenever an Instructor Trainer candidate fails an Instructor Trainer course outright or a certification evaluation while apprenticing at an Instructor course, the Master Instructor Trainer(s) must submit a written report with the course paperwork detailing why the IT candidate failed.

4.18.2 If there is a conflict regarding the outcome of participating in an Instructor Trainer course, the Instructor Trainer candidate must first contact the appropriate staff coordinator in writing. (Email is acceptable.) The Training Director will investigate the complaint with the Training Chair, Vice Chair of Standards & Credentials and others as appropriate. A report on the findings will be forwarded to the Training Director. The Training Director will inform the Instructor Trainer candidate of the outcome of the investigation in a timely fashion.

4.19 Dismissal from Instructor Trainer Course or Apprenticeship Evaluation

4.19.1 Insubordination, rude or unprofessional behavior, sleeping during class, evidence of drunkenness, use of illegal drugs, absenteeism or other inappropriate behavior are grounds for dismissal from an Instructor Trainer course or as an Instructor Trainer apprentice at an Instructor course. A report shall be filed with the Training Office in case further investigation is needed. The course fee will not be refunded.

5. INSTRUCTOR TRAINER POLICIES (ITs)

5.1 Instructor Trainer Description

5.1.1 US Sailing Instructor Trainers evaluate, train and certify instructors/coaches in Small Boat Sailing, Windsurfing, Powerboating and Keelboat Instructor courses. ITs are considered professionals in the sailing and boating education field and are highly respected contributors to the educational process of producing credible, safe, instructors and coaches. In the process of conducting an Instructor course, Instructor Trainers are considered contract employees of US Sailing.

5.2 Instructor Trainer Code of Conduct

5.2.1 Instructor Trainers are expected to uphold and comply with the stated mission of US Sailing's Training & Education program, its standards and policies for Instructor Trainers, and to treat students, staff and equipment with respect.

5.2.2 US Sailing expects from its Instructor Trainers the highest set of ethical and moral standards. ITs should be law-abiding individuals who provide responsible, positive leadership to their students and peers. US Sailing encourages and expects its Instructor Trainers to be honest and dignified role models for their profession.

5.2.3 Instructor Trainers should, in any setting or gathering where they are perceived by others as representing US Sailing, recognize their responsibility as role models for their profession and conduct themselves as such in a professional, responsible manner. (As approved 10/21/95)

5.2.4 Appearance Guidelines - Suggested standards:

- **Hair:** Neatly groomed, clean, tidy.
- **Facial hair:** Clean-shaven unless mustache and/or beard are routinely worn.
- **Clothing:** Clean and neat, with no holes, tears or stains. No printing or illustration referring to alcohol, controlled substances, profanity or unprofessional behavior. ITs should wear collared shirts. No "Speedo" or bikini-type swimwear. No bare chests. Tank tops are discouraged.
- **Footwear:** Around the waterfront and aboard boats, no open-toed, open-sided sandals. Shoes should have closed toes and sides and have positive closure (laces or

Velcro). No bare feet at any time, in the classroom or on the waterfront. Open-toed, open-sided sandals are not recommended.

- **Caps:** Caps, hats or visors should not be worn indoors.
- **PFDs:** PFDs with holes or tears are illegal, and should not be used. PFDs should be of the proper size, so they fit snugly. When afloat, PFDs should be properly fastened. *(As approved 10/21/95)*

5.2.5 Smoking - At Instructor courses, smoking should be limited to permitted areas or outside the building, at breaks, and not be done below decks on any training vessel, power or sail. *(As adapted from policy approved (As approved 10/21/95)*

5.2.6 Language - In order to create a more comfortable environment for learning, ITs are not to engage in the use of profanity, or any language or verbiage, that would be reasonably construed as sexist, racist, off-color, vulgar, or otherwise inappropriate to their status as a professional instructor. They shall also not condone such language in their students or in their courses. *(As approved 10/21/95)*

5.2.7 Consumption of Alcohol - (This recommendation applies to all instructor candidates, instructors, and Instructor Trainers.) The use of alcohol and/or controlled illegal substances during any training course while in session shall be considered as cause for suspension and/or dismissal. *(As adapted from policy approved 10/21/95)*

5.2.8 Dispensing of Drugs - ITs should not dispense any prescription or non-prescription medications to minors without written consent of the parents. The medication must be in its own labeled medication container with written instructions. *(As approved 10/21/95)*

5.2.9 Favoritism & Harassment Issues - ITs need to have awareness and sensitivity to perceived behavior and conduct and the effect they have on what is considered appropriate and inappropriate behavior. Some examples of what is generally considered acceptable are: verbal praise, a pat on back of the shoulder, a “high-five”, a handshake, etc. Caution must be exercised when other body contact is involved, including even the most well-meaning affectionate hug. Teachers and camp counselors receive guidelines in these areas of concern, including such issues as avoiding being caught in a situation where they are alone with a student. Displaying obvious favoritism or “picking on” an individual either privately or publicly in front of a class or group can also be perceived as harassment or abuse. ITs need to be aware and to make sound judgments. *(As adapted from policy approved 10/21/95)*

5.3 Instructor Trainer Responsibilities

5.3.1 Some responsibilities US Sailing Instructor Trainers assume include:

- Maintaining current US Sailing membership
- Maintaining currently accepted First Aid/CPR
- Maintaining current USCG licenses, if appropriate
- Teaching each instructor course for the full allotted time using US Sailing materials and techniques
- Treating each instructor candidate fairly and equally with no bias or discrimination
- Reporting incidents, accidents or behavioral problems to the Training Office as soon as possible after the situation is under control
- Using good judgment regarding giving the swim check in uncertain water quality and/or sending instructor candidates out in threatening weather and/or against the advice of the host facility representative
- Returning completed course paperwork to the Training Office within the time dictated by policy and the Training Office
- Being aware of IT expenses and keeping reimbursable travel and course expenses within the allowances as set by the Training Office

5.4 Maintaining Current Instructor Trainer Certification

5.4.1 To remain currently certified an IT must teach at least one public (not in-house) instructor course within a 2-year period and hold current US Sailing adult membership and currently approved First Aid/CPR and current U.S Coast Guard license (if applicable). Additional time between courses taught may be granted by the Training Office following a written request for extension by the IT. *(Approved 3/16/02)*

5.4.2 Powerboat Instructor Trainers who were certified prior to 2006 without a U.S. Coast Guard license are urged to comply with this requirement as soon as possible, but not later than January 1, 2009. *(Approved 11/18/2006)*

5.4.3 Keelboat Instructor Trainers who teach at least one instructor course a year maintain their certification automatically. *(Approved 10/18/97 from National Faculty recommendations 9/28/97)*

5.4.3 Instructor Trainers serve at the pleasure of the Training Committee.

5.5 Recertification

- 5.5.1** Recertification is not required of any currently certified IT who currently teaches at least one public (not in-house) instructor course within a two year period. See 5.5.1.
- 5.5.2** An IT who has allowed his or her certification to lapse may be reinstated after co-teaching an Instructor Course without remuneration from US Sailing and demonstrating the skills and practices required of an active IT. *(As approved 1/28/90 and updated 3/16/02)*
- 5.5.3** ITs are expected to keep up to date on methods and materials essential to their top performance as representatives of the US Sailing programs. Attendance at recertification sessions may be called and/or required by the Training Committee. Recertification sessions may be conducted at national US Sailing meetings, symposia, website or regional meetings approved by the Training Director. *(As adapted from policy approved 3/16/02 and amended 3/17/2007)*

5.6 Instructor Trainer Policies for Teaching Instructor Courses

- 5.6.1** Only currently certified Instructor Trainers in good standing may conduct US Sailing Instructor courses.
- 5.6.2** Instructor Trainers will use US Sailing course materials and support US Sailing's standards and policies.
- 5.6.3.** The Training Office should be notified immediately (preferably by phone or email), of any accidents/incidents that occur during a course. This would include, but is not limited to: any boat or property damage, emergencies or injuries involving instructor candidates, other personnel or observers and include a written report of the incident(s) with the course paperwork. *(As adapted from policy approved 10/21/95)*
- 5.6.4** ANY "unsatisfactory" noted in sailing skills, safety boat or powerboat skills, or professional conduct and attitude will preclude the instructor from passing the course.
- 5.6.5** The Swim Check (if applicable) and Marlinspike Seamanship test will remain a pass/fail.

- 5.6.6** It is recommended that each IT, when teaching a course, hand out the Evaluation Forms at the beginning of the course to:
- 1) Have the instructor candidate fill out the top portion of the form to save time for the IT.
 - 2) Give the instructor candidate the opportunity to see what he/she will be evaluated on.
 - 3) Help eliminate the possibility of a misunderstanding later
- 5.6.7** Traveling Instructor Trainers should not be housed with an Instructor Candidate or an Instructor Candidate's family. Likewise traveling Instructor Candidates should not be housed with an Instructor Trainer. (As approved 3/16/02)
- 5.6.8** A Small Boat Instructor Trainer shall co-teach his or her first Instructor Course without remuneration from US Sailing.

5.7 Paperwork Policies for Instructor Trainers

- 5.7.1** Course paperwork shall be completed and postmarked within two weeks following a course (for courses/evaluations requiring 1 IT). Courses requiring multiple ITs must forward course paperwork to the Training Office within three weeks following a course. (Approved 10/21/95)
- 5.7.2** Courses requiring multiple ITs (triple courses) must forward course paperwork to the Training office no later than 4 weeks following a course. (Approved 10/21/95)

5.8 Pass, Fail, Plans of Improvement & Plans of Completion

- 5.8.1** Instructor Trainers have the responsibility to pass, fail, or offer a Plan of Improvement to the candidates in their course. See 2.18 for details on a Plan of Completion. (Approved 10/21/95)
- 5.8.2** US Sailing Membership, First Aid and CPR are requirements for certification, but *are not* to be considered in the Pass/Fail decision as they may be completed after the course. (Approved 10/21/95)

5.8.3 Should US Sailing membership and First Aid and CPR be absent, the instructor candidate's temporary certification card should be withheld. An official certification card will be issued from the Training Office pending evidence of US Sailing membership and/or FA/CPR certification. *(Approved 10/21/95)*

5.8.4 Passing the instructor candidate:

The candidate satisfactorily meets all the requirements for becoming a US Sailing instructor, including passing all the written tests and the practical skills tests – plus the IT's evaluation.

5.8.5 **Offering a Plan of Improvement:**

- 1) The candidate meets the majority of requirements, but has an easily improved deficiency, such as weak boathandling skills, less-than-acceptable swimming ability, or failure to pass one or more of the written tests.
- 2) The candidate should be given the opportunity to improve practical skills and/or study prior to being retested to successfully complete the course.
- 3) A set and defined period of time should be established for the retesting.
- 4) The time frame for a Plan of Improvement should be long enough to allow the candidate to master the deficiency, but short enough to keep a bit of pressure on to complete the course; the candidate's employment might depend on successful course completion.
- 5) Instructor Trainers should be specific with Plans of Improvement and subsequent re-testing requirements.
- 6) If the IT lives close by, the candidate should notify the IT when the candidate feels they're ready. The IT can then make arrangements to do the retesting.
- 7) If the IT is not from the area or is not returning there, the IC should contact the Training office to set up the re-test with another IT.

5.8.6 **Fail the candidate:**

- 1) Any candidate whose boathandling, teaching or interpersonal skills are so weak that even offering a Plan of Improvement is not realistic or feasible should not pass the course or be offered certification.
- 2) It is most important that should a candidate fail, complete documentation as to why the candidate failed be written up in detail on the Instructor Evaluation Form or on a separate sheet of paper.
- 3) It is important that the IT call the Training Office as soon as possible to alert the Training Director to the situation, reviewing the circumstances for the candidate's failure. Examples of failing circumstances: unacceptable swimming or boathandling,

rude/inattentive behavior, non-participation, sleeping through class, or not attending for one or more days of the course.

- 4) If the candidate should pass *all* of the course requirements but the IT judges the candidate to be marginal and/or someone the IT is not *totally comfortable* passing, the IT should consider either a Plan of Improvement or failing the candidate.

NOTE: IT's do no one – not the candidate, other classmates, the candidate's students, or employer – any favor by signing someone off who doesn't measure up. Being an IT is a responsibility, not a popularity contest. An IT should feel confident about everyone they pass. Candidates are a product of their own skills and achievements or lack thereof, not a reflection of the IT.

5.9 Failure of ITs to Complete Course Paperwork

- 5.9.1** Failure to have completed paperwork into the Training office by deadline (see 5.8.2, page 36) will result in a 50% reduction in salary. *(Approved 10/21/95)*
- 5.9.2** A warning letter shall then go out from the Training office to the IT to the effect that if the paperwork is not received within ten days, the IT shall forfeit 100% of their salary and be placed on indefinite suspension. *(Approved 10/21/95)*
- 5.9.3** If the paperwork is not received within the deadline, the IT shall be suspended. Another IT shall be assigned to conduct any subsequent courses scheduled for that IT. *(Approved 10/21/95)*
- 5.9.4** An IT who has been suspended can only be reinstated by written petition to the Training Committee Chair. Such petition shall present valid, detailed reasons for reinstatement. *(Approved 10/21/95)*
- 5.9.5** Reinstatement shall be probationary. IF a second violation occurs during probation, the IT's certification shall be revoked. The Training Committee Chair shall confer with the Training Director, the Vice Chair of Standards and Credentials, and the Master IT(s) (if appropriate.) The final decision shall rest with the Training Chair. The IT shall be notified in writing of the decision by the Training Committee Chair, or, at the Chair's discretion, the Training Director. *(Approved 10/21/95)*

5.10 Payment Procedures

5.10.1 ITs will be paid for teaching an instructor course when all the paperwork associated with a course has been received in the Training office in the appropriate time span. Failure to get course paperwork in on time could result in forfeiture of teaching fee/expenses. *(See 5.10)*

5.10.2 The Training Office must process payment paperwork for ITs within 48 hours. Once check requests leave the Training Office, internal bookkeeping can take up to three weeks for the check to be issued and mailed.

5.10.3 Instructor Trainers receive payment appropriate to the course they taught. Receipts for allowed expenses, where applicable, should be included with the course paperwork.

5.10.4 ITs may be reimbursed for the following expenses:

- **Airfare** – Coach class airfare with the ticket purchased as far in advance as possible. Airfare has to have prior approval from the Training Office. Every effort is made to provide an IT from as close to a course site as possible; however, when necessary, ITs from other areas are brought in to conduct courses.
- **Gas & Tolls** – (save receipts) **OR Mileage & Tolls** (contact the Training Office for current reimbursable rate)
- **Bus or Train fare** – to/from a course
- **Cabs or Shuttles** to/from airport to course site or home if getting to the airport is a problem
- **Hotel** – While most ITs are guests in private homes, ITs can be reimbursed for reasonable lodging starting the night before a course begins, ending the last day of the course.
- **Meals** – ITs are allowed up to \$45 a day for meals during the course and travel to/from the course (airports, etc.). Reimbursable meal expense is only for the IT, not for guests, the instructor candidates, etc. Save receipts whenever possible.
- **Copying/Printing/Telephone** – There may be occasions when it will be necessary to have some copies made or to make a few phone calls. Keep receipts and note the reason the extra copying or calls were required. Turn in the receipts with the course paperwork.

Expenses not allowed:

- First class airfare
- Alcoholic drinks
- Prescription or over-the-counter medications
- Car repairs while on the road
- Meals or snacks for the class
- Hostess/Host gift
- Mileage AND gas (one or the other is allowed, but not both)

Note: Xeroxing, DVD rentals, phone calls and postage are considered an RTC expense.
(Approved 1/28/90)

5.10.5 All allowable expenses & receipts must be submitted within 60 days of the completion of the course or they will not be paid. *(As adapted from policy approved 10/22/88)*

5.11 Disciplinary Action for Instructor Trainers

5.11.1 Administration of Incidents Involving ITs - Reports regarding incidents involving alcohol, illegal controlled substances and/or inappropriate behavior should be submitted in writing to the Training Director. The person involved in the alleged incident will be given the opportunity to respond to the accusations in writing to the Training Director. The Training Director will then distribute the gathered material to the Training Committee Chair, the Vice Chair for Standards and Credentials, and the Master IT(s) (if appropriate), for their review and discussion. The final decision on whether any action should be taken shall rest with the Training Committee Chair. The Training Director shall make notification of either a favorable resolution or of disciplinary action in writing to the person charged. *(As adapted from policy approved 10/21/95)*

5.11.2 When input on an Instructor Trainer is received from evaluations, calls and/or written communication which indicates action is needed, the Training Committee Chair, appropriate Master IT(s), Vice Chair of Standards & Credentials and the Training Director shall discuss what steps or action would be appropriate, and the IT will be so advised in writing. It is recommended the action include, if possible, classroom observations, a thorough assessment in the areas of concern, and/or a Plan of Improvement within a specific time span, which, if not complete, would constitute grounds for dismissal. *(As approved 10/21/95)*

5.11.3 Misconduct and discipline

Occasionally, it becomes necessary for US Sailing to take disciplinary action against an IT, Instructor Candidate or Instructor. Discipline results when a party's actions do not conform with generally accepted standards of good behavior, when an employee violates work rules, when an employee's work performance is poor or when an employee misrepresents his/her academic or professional credentials.

The severity of the disciplinary action depends on the nature and frequency of the offense. Discipline may range from oral warning(s), to written warning(s), to temporary suspension of certification, to immediate revocation of certification.

5.11.4 Discipline procedure

- There is no effective method of pre-determining the seriousness or effect of any one violation of US Sailing policy or of making an exhaustive list of all possible violations of policy. Although some violations may be more severe than other violations, repeated violations or a combination of violations may result in revocation of certification.
- US Sailing reserves the right to take any disciplinary action, including suspension or revocation of certification, in all cases it deems appropriate. Possible disciplinary actions include, but are not limited to:
 - Oral Warning
 - Written Warning
 - Following a written warning, US Sailing may require the offending party to sign a written agreement to correct his or her behavior or performance. This agreement will include:
 - A brief statement of the wrong behavior or cause of poor performance,
 - A statement that clearly and specifically spells out the required correct behavior or performance,
 - A specific, limited time frame for the employee to comply or change,
 - The consequences to the employee if the correction does not occur,
 - An acknowledgement that the employee understands,
 - The employee's signature and date signed.
 - In certain circumstances, a certification may be suspended. This may be protective action taken to eliminate an immediate problem and to allow proper time for investigation before taking further corrective action. The Training Office will write an incident report of all facts. A copy of this memo or report will be signed, indicating receipt of the report, and will be placed in a confidential personnel file.
- US Sailing may revoke any certification for any reason, including unacceptable work performance or misconduct.

5.11.5 Refer to the official Code of Conduct for more details. *Approved 11/18/2006*

5.12 Withdrawal of Instructor Trainer Certification

5.12.1 Grounds for Withdrawal of Instructor Trainer Certification are as follows:

- 1) Failure to uphold US Sailing standards and policies as set by the Training Committee and US Sailing.
- 2) Operating vessels or conducting teaching activities in an unsafe manner where safety is defined by current US Sailing policies or government regulations.
- 3) Misuse of instructor cards, stickers, logbooks, certificates and/or tests.
- 4) Unprofessional conduct, criminal acts such as fraud, substance abuse, etc.
- 5) Consistent failure to complete course paperwork within the prescribed time limits and/or not passing in course paperwork at all.

5.12.2 Withdrawal of Instructor Trainer certification is administered by the Training Committee Chair on recommendation of the Vice Chair of Standards & Credentials and the Training Director for violation of US Sailing Training Program policy. The process for handling complaints and withdrawal of certification is:

- 1) All complaints must be made in writing to the Training Director, the Vice Chair of Standards & Credentials and the Training Committee Chair.
- 2) Third party complaints will not be considered except in unusual circumstances.
- 3) The Training Director and the Vice Chair of Standards & Credentials will review complaints received in writing and not resolved within a reasonable time by parties to the complaint.
- 4) The Vice Chair of Standards & Credentials will write a report regarding the complaint. The report will be sent to the Instructor Trainer, the Training Committee Chair and the Training Director and any other individuals that the Vice Chair deems appropriate.
- 5) The Training Director will send the Instructor Trainer a warning that his/her activities were under review and make a recommendation to the Training Committee Chair to withdraw the certification of the Instructor Trainer. The Instructor Trainer will be given the opportunity for rebuttal.
- 6) Instructor Trainers may be decertified or may not be invited to continue as Instructor Trainers by failing to adhere to the policies set by US Sailing as the standard for Instructor Trainers.
- 7) Any other items and/or matters, which the Training Committee deems appropriate for a recommendation for loss of certification.

5.13 Master Instructor Trainers

- 5.13.1** Master Instructor Trainers are appointed by the Training Committee at the recommendation of a working party consisting of the Training Chair, Vice Chair of Standards & Credentials, the Master Instructor Trainers appropriate to the IT courses requiring more MITs, and others as required to make an informed decision.
- 5.13.2** MITs serve at the pleasure of the Training Committee. Master Instructor Trainers abide by the same policies as Instructor Trainers and are expected to conduct themselves as professionals and experts in their given discipline.
- 5.13.4** Master ITs are subject to the same policies that pertain to Instructor Trainers as described in Section 5 of this manual. *(Approved 4/2/2005)*
- 5.13.5** Role modeling being especially critical at the IT level, MITs are to model the behavior expected of an MIT. The following should therefore be adhered to:
- Travel time should be so arranged as to accommodate arriving at the course location well ahead of time and staying on until all exit interviews are completed and a course and candidate debrief has been conducted with co-MIT. Co-MITs, working with the appropriate Training Coordinator in the Training Office, should take personal responsibility for making sure all is in readiness at the course site, including classroom, boats, docks, and any needed equipment. While much can be facilitated by the Training Coordinator, it remains the ultimate responsibility of MITs to be the “duty officers of the watch.”
 - Any handouts to be used in the course should be prepared ahead of time in an appropriate typewritten format consistent with that used in the IT Manual. A copy should be provided to the co-MIT in advance.
 - Co-MITs should work together to provide a general schedule as well as a daily one, and make every effort to stick to them as closely as possible. If changes are necessary, a full explanation as to the reasons for the change should be provided to the candidates so they have a solid understanding of the situation and the need to monitor and adjust.
 - Each morning one MIT should be in contact with the facility liaison or club manager to make sure no unexpected conflicts have developed regarding the use of the facility, classroom, TV/DVD, dock/waterfront area, boats, restrooms, parking, etc.
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- Observation and evaluation of candidates' boathandling skills and on-the-water drills should be conducted with the MIT(s) in a safety boat, where they have complete group control and can respond immediately to emergency situations. Written evaluations, POIs, and other course paperwork should be completed ASAP following the course, and should be received by the Training Office no later than two

weeks following the course conclusion. Responsibility for this should *NOT* be left to one MIT but should be a joint effort. *(Approved 4/2/2005)*

5.13.6 MITs are required to conduct at least one basic instructor course for their given discipline within a two-year period. *(Approved 4/2/2005)*