

Small Boat Sailing Level 1 Instructor Course

Instructor Candidate Evaluation Booklet

*This booklet contains forms that will be completed by the
Instructor Trainer at your course.*

*The first pages contain a Statement of Understanding, a Safety Boat Self-
Assessment form and a Medical/Emergency Information form. Please
complete these three forms prior to arriving at your Instructor Course.*

Please also complete the information listed below.

Instructor Candidate's Name _____

Course Location _____

Course Dates (Start/End) _____

Instructor Trainer(s) Name _____



US Sailing Training Program

Small Boat Sailing Level 1 Instructor Candidate Evaluation

Name of Instructor Candidate _____

Last First MI

Membership # _____ Date of Birth _____

Address _____

Street City State Zip Code

Phone Number (C) _____ (H) _____

Email Address _____

Course Location _____ Date _____

Instructor Trainer(s) _____

SUMMARY SECTION

To be completed by Instructor Trainer (please print)

	PASS	POI	FAIL	SCORE
Practical Skills				
☐ Water Comfort Check	_____	_____	_____	
☐ Marlinspike / Seamanship	_____	_____	_____	
Practical Skill Test Scores (Max. 100/Min. 80)				
☐ Personal / Interpersonal Skills	_____		_____	Pass/Fail Only
☐ Classroom Presentation Skills	_____	_____	_____	_____
☐ Land Drill Teaching Skills	_____	_____	_____	_____
☐ Water Drill Teaching Skills	_____	_____	_____	_____
☐ Safety Boat Skills	_____	_____	_____	_____
☐ Sailing Skills	_____	_____	_____	_____

Appointment Status

- ☐ Appointed Instructor
- ☐ Appointed Sailing Assistant (under 18)
- ☐ To be appointed upon successful completion of POI
- ☐ Not appointed

Instructor Trainer Notes

- ☐ Keep this document for your records; this does not need to be returned to US Sailing
- ☐ Return the *Voluntary Medical Disclosure & Emergency Contact Form* to the Instructor Candidate at the end of the course.

Statement of Understanding

(Please complete this form before your Instructor Course)

The US Sailing Small Boat Sailing Level 1 Instructor Course is an exciting and demanding challenge. You need to be aware of what will be involved and be willing to study and practice in order to achieve success and receive maximum benefit from the course.

All students are required to partake in a water comfort check. The check consists of swimming 25 yards and treading water for one minute while wearing a Type III USCG-approved life jacket. The Medical/Emergency Information form provided in your basic packet from US Sailing must be completed and signed by you or a parent or legal guardian and turned in prior to course commencement.

All Level 1 Instructor Candidates must possess a NASBLA Safe Boating Course Certificate. A list of approved providers can be found at www.nasbla.org.

You will be required to provide your own Type III life jacket which must be USCG-approved and the proper size for your weight and build. It should be comfortable since you will be wearing it at all times while you are on or near the water. You must wear closed toed shoes at all times while you are in the boats, on the piers and in the boat launching area. Bring a change of clothes and a towel each day. Other supplies that you will need are listed in the information letter provided by US Sailing representatives.

Please carefully read and sign the following agreement; if you are under 18, a parent/guardian must read and sign the second agreement.

I understand that in enrolling and participating in this sailing course, I agree to obey all program rules as set forth by the Instructor Trainer. I agree that I will use utmost care in the use of the boats and equipment. I understand that if I fail to attend regularly, arrive promptly and abide by the rules, I may be suspended from the program.

Student Name (please print)

Student Signature

Date

Parent/Guardian Agreement

I/We understand the contents of this Agreement. I/We agree to see to it that my/our child adheres to the program rules. I/We agree to assume the obligation of the expenses of repair and/or replacement of program equipment whose loss or damage is attributable to my/our child's reckless or irresponsible behavior.

Further, in consideration for my minor child being permitted to enroll in a US Sailing Small Boat Sailing Level 1 Instructor Course, I/we agree that I/we will not make any claim, either for ourselves or on behalf of my/our child, against US Sailing, its representatives, or against the host organization or its officers, or members for any personal injuries or wrongful death to such child, or for damage to any of the child's property, arising out of the activities of this course.

Parent/Guardian Name (please print)

Parent/Guardian Signature/Date

Pre-course Assignment Checklist (Online & In-Person)

How should I prepare for the Level 1 Course?

- **Read**
 - *Small Boat Sailing Level 1 Instructor Guide (includes Learn Sailing Right! Beginning Sailing)*
 - *Learn Sailing Right! Intermediate Sailing*
 - *Basic Powerboating, Safety and Rescue*
- **Complete**
 - Medical/Emergency Information form (*If under 18 years of age a parent/guardian signature is required*)
 - Safety Boat Self-Assessment Form
 - All review questions
 - *Teaching and Coaching Fundamentals Online*
 - NASBLA Safe Boating Course Certification
 - US Sailing will recognize a NASBLA-approved certificate from any state but recommends that you take the course in the state in which you intend to be working/boating predominantly. Different states have different requirements for how you can obtain that certification. Some states require attendance at a course, while others recognize online training. Visit www.nasbla.org for clarification on your state's requirements.
 - US Powerboating offers an approved Safe Powerboat Handling Course in many states. Information about that course can be found at www.uspowerboating.com.
 - Smallboat Level 1 Online Course (10 days) prior to completing the in-person portion (2 days.)
- **What materials do I bring each day for the in-person portion?**
 - Lunch or money for lunch
 - Paper and pen
 - Course Materials
 - Review questions
- **What gear do I bring each day?**
 - Type III USCG-approved life jacket in proper condition
 - Whistle
 - Towels
 - Change of clothes
 - Change of shoes
 - Sailing gear
 - Watch
 - Closed-toe shoes (no sandals or flip flops)

Course Materials

The books and materials for this course are digital. [Access Digital Course Materials](#)

Login: US Sailing Member ID

Password: US Sailing Password.

Please visit [US Sailing](#) if you forgot your My USSailing login or password.

You may also download the US Sailing Bookstore app to view these books on your Tablet or Smartphone.

It is also recommended that you complete the following in advance of the course, but completion is not required to attend the course (only for certification to be active):

- CPR and First Aid certification from a USCG-approved provider.
- SafeSport Online Training (<https://www.ussailing.org/competition/resources/safesport-us-sailing/>).

Voluntary Medical Disclosure & Emergency Contact Form

(Please complete this form before your instructor course)

Note: This form is to be completed only by Instructor Candidates (or the parent/guardian of Instructor Candidates who are minors) who wish to disclose medical conditions that Instructor Trainers, staff, or medical personnel should be aware of during this course. This form and the information contained herein will be kept secure and confidential during this course and will thereafter be returned to the Instructor Candidate.

Instructor Candidate Name: _____

Emergency Contact(s)

Name	Relationship	Phone Number

Please provide any medical condition or allergies that the Instructor Trainers, staff, or medical personnel should be aware of while you are enrolled in this course:

Please provide any relevant instructions or directions that may be useful for Instructor Trainers, staff, or medical personnel:

Instructor Candidate Signature (or parent/guardian if minor)

Date

Safety Boat Skills Evaluation Criteria and Self-Assessment Form

Listed below are the powerboat handling skills you will be expected to successfully perform at the instructor course in conditions that may include heavy winds and seas. Rate your skill level by checking the appropriate box.

*Animations and videos of some of these skills can be viewed at <https://uspowerboating.com/videos/>
Practice before the test in as many different boat types as possible*

	Highly Skilled	Skilled	Some Skill	Little or No Skill
1) Prestart Checklist				
a. Identify all legal and equipment requirements for the test boat: Certificate of Number, validation decal, registration numbering, life jackets, fire equipment, ventilation, sound signaling devices, lights and visual distress signals	☐	☐	☐	☐
b. Check motor mounts, trim and tilt angle, fuel amount, fuel connections, ignition switches, kill switch, throttle level, choke position, gear position, pump primer bulb (see US Sailing's <i>Basic Powerboating, Safety and Rescue</i>)	☐	☐	☐	☐
c. Use appropriate starting procedure (cold start) for this type of engine (see US Sailing's <i>Basic Powerboating, Safety and Rescue</i>)	☐	☐	☐	☐
2) Leaving Dock (without any assistance)				
a. Dock lines cast off and securely stowed	☐	☐	☐	☐
b. Maneuver safely away from dock without pushing off	☐	☐	☐	☐
c. Bring aboard and stow fenders	☐	☐	☐	☐
3) Slow-speed Maneuvering				
a. Back boat on a straight course	☐	☐	☐	☐
b. Maneuver in forward and reverse on a slalom course	☐	☐	☐	☐
4) Upcurrent/Upwind Position Hold				
a. Maneuver to a position directly upwind or upcurrent (whichever is dominant) of a designated buoy	☐	☐	☐	☐
b. Turn so that vessel's bow is within reach of buoy with stern directly upwind/upcurrent	☐	☐	☐	☐
c. Hold this position for at least 10 seconds without drifting onto the buoy and without allowing the stern to swing from its upwind/up current position	☐	☐	☐	☐
5) Pivot Turn				
a. Turn vessel 180 degrees within a 1-2 boat length space	☐	☐	☐	☐
6) High-speed Maneuvering				
a. Operate in planning mode	☐	☐	☐	☐
b. Execute controlled turns	☐	☐	☐	☐
c. Execute high-speed stop	☐	☐	☐	☐
7) Recovery of Simulated Person in the Water				
a. Approach from downwind	☐	☐	☐	☐
b. Maneuver alongside and stop within easy arm's reach	☐	☐	☐	☐
c. Neutral throttle and switch off ignition	☐	☐	☐	☐
d. Bring aboard	☐	☐	☐	☐
8) Docking: the standard is to bring the boat to a full gentle stop alongside a dock within 3 feet of a previously designated spot. Ideally, two fenders positioned several feet apart alongside the hull will touch the edge of the dock simultaneously.				
a. Upwind approach – alongside dock	☐	☐	☐	☐
b. Downwind approach – alongside dock	☐	☐	☐	☐
c. Secure boat to dock	☐	☐	☐	☐

The powerboats that I am most familiar with are:

	Type/Design	Length	Horsepower	Time (mos.)	Activity/Use (e.g., launch operator, fishing)
1)	_____	_____	_____	_____	_____
2)	_____	_____	_____	_____	_____
3)	_____	_____	_____	_____	_____

Based on the above, I judge my safety boat handling skills to be (check one)

- ☐ Highly skilled. Anticipate no problem passing on-the-water testing.
- ☐ Skilled, but may need some brushing up in areas indicated.
- ☐ Skills rusty. Not sure can perform required skills. Need considerable practice.
- ☐ No or little experience in safety boat handling. Need to seek training prior to course.

Locations offering US Powerboating's Safe Powerboat Handling: <http://www.uspowerboating.com/find-a-course> or you can contact US Sailing's Adult Department by phone 401-342-7900 or email powerboat@ussailing.org

I have assessed my boat handling skills objectively. I fully understand the performance guidelines and acknowledge that inability to perform the required skills could affect my successful completion of the instructor course.

Instructor Candidate Name (print)

Signature

Date

Safety Boat Guidelines

- 1) Weather forecast
- 2) Tidal predictions
- 3) Up-to-date charts on safety boats (USCG's Notice to Mariners continuously reports changes on charts)
- 4) Compass
- 5) Fuel onboard
- 6) Firefighting equipment as per USCG regulations
- 7) Basic onboard equipment, life jackets, engine tools & spares, oars/paddles, towlines, anchor & anchor line
- 8) Drain plugs securely fastened
- 9) Bilge pumped out
- 10) Outboard engine is in correct down position
- 11) Blower on before starting, if applicable
- 12) Follow starting instructions
- 13) Check water discharge on water-cooled engine
- 14) Warm up engine for 1-2 minutes

Small Boat Sailing Level 1 Instructor Course

Course Information and Prerequisites

A. Small Boat Sailing Level 1 Instructor Course Goals

The US Sailing Small Boat Sailing Level 1 Instructor Course is designed to provide sailing instructors with information on how to teach more safely, effectively and creatively. The goal of the program is to produce highly qualified instructors, thereby reducing risk exposure for sailing programs at yacht clubs, sailing schools, community boating programs, camps, parks and recreation programs, high schools, colleges, American Red Cross programs, YMCAs/YWCAs, Scouts and other organizations.

Topics covered in the course include: Classroom and on-the-water teaching techniques, risk management, safety issues, lesson planning, creative activities, ethical concerns and sports physiology and psychology.

B. Minimum Age for Small Boat Sailing Level 1 Certification

A US Sailing-recognized Small Boat Sailing Level 1 Instructor must be at least 18 years old. To attend a US Sailing instructor course, *the Instructor Candidate must be at least 16 years old* by the end of the calendar year in which the course is offered. Upon successful completion of an instructor course, the 16-year-old will be designated a Sailing Assistant until turning 18, at which time he/she may contact the Education Department to obtain an instructor card. Instructor cards are also available through the My US Sailing portal on the US Sailing website (www.ussailing.org).

C. A Certified Small Boat Sailing Level 1 Instructor Must Complete, Demonstrate and/or Provide the Following:

- 1) NASBLA Safe Boating Course Certification (www.nasbla.org). Options range from an online test to hands-on and classroom courses. The NASBLA website also lists any state-specific requirements; it is the responsibility of the Instructor Candidate to be aware of the safe boating laws of the states in which they are taking the course and where they are teaching, and make sure they are in compliance with those laws. *Candidates will not be allowed to participate in the course without proof of completion!*
- 2) Complete *Teaching and Coaching Fundamentals Online* course.
- 3) Complete background screening through an approved US Sailing-provider.
- 4) Demonstrate sailing proficiency in small boats such as prams, dinghies, multihulls and day-sailing keelboats.
- 5) Demonstrate proficiency* operating a safety boat. This skill will NOT be taught at the course. Instructor Candidates who lack adequate safety boat experience should either seek opportunities to practice or attend a US Sailing Basic Powerboating Course. Candidates who do not possess adequate safety boat operation skills will receive a Plan of Improvement (POI), requiring a subsequent retest, which carries a fee of \$75. **See page 4 for definition of proficient safety boat operation*
- 6) Safety Boat Skills Self-Assessment Form given to Instructor Trainer at the start of the course
- 7) Meet the Water Comfort Check Guidelines by swimming 25 yards and treading water for one minute while wearing a Type III USCG-approved life jacket.
- 8) Ability to exhibit appropriate personal and interpersonal skills.
- 9) US Sailing adult individual or family membership (one instructor per family membership is allowed)
- 10) Completed Voluntary Medical Disclosure & Emergency Contact Form given to Instructor Trainer at the start of the course.

Attendance at all course sessions is mandatory.

Absence from any portion of the course will exclude the Instructor Candidate from certification.

US Sailing Small Boat Level 1 Certification is valid only when accompanied by current USCG-approved First Aid and CPR certifications and a current SafeSport certificate.

Successful completion of the course includes passing the following practical and written tests administered at the course and a positive evaluation attained in certain areas. It is the candidate's responsibility to inform the Instructor Trainer if accommodation is needed for any assessments. The practical and written tests each stand on their own, and each must be passed in order to pass the course. The determination as to whether a candidate passes or fails rests with the Instructor Trainer. In addition to Pass or Fail, a third option is a Plan of Improvement (POI). Retesting for a POI can be scheduled through the US Sailing's Education Department or by taking a *Plan of Improvement Course* for which a candidate can register through the US Sailing website.

- 1) **Sailing Skills Practical Test: Execute with Competence and Confidence:** Rigging, leaving a dock/beach, starting, stopping and speed control, safety position, getting out of irons, sailing backward, tacking, jibing, steering with sails and weight, proper sail trim, judging laylines, capsize and overboard recovery, returning to dock/beach, unrigging.
- 2) **Safety Boat Operation Skills Practical Test: Execute with Competence and Confidence:** System, equipment and starting checks, leaving and docking, high and low speed maneuvering, holding position upwind / upcurrent, backing, pivot turn (180 degree turn within 1 to 2 boat length), anchoring and/or making fast to a mooring, overboard recovery and landing alongside a moored boat.
- 3) **Written Exams:** There are two closed-book exams on the written materials and sailing theory. A passing grade of 80% is required on all exams.
- 4) **Water Comfort Check:** Dress appropriately to participate in the water comfort check, wear a drysuit or wetsuit if needed for cold weather days. Select and put on a properly fitting USCG approved life jacket. Step or jump into the water over your head. Return to the surface and float or tread water for one minute. Swim 25 yards parallel to the dock, if possible. Exit from the water. If in pool, exit without using the ladder.
- 5) **Marlinspike / Seamanship Practical Test:** Demonstrate ability to tie the following knots and hitches: Figure-8, bowline, square knot, sheet bend, clove hitch, two half hitches, rolling hitch, cleat hitch. Also coil and throw a line.
- 6) **Personal and Interpersonal Practical Skills:** Demonstrate professional conduct, an open-minded, positive and enthusiastic attitude, appropriate appearance (clothing, footwear and tidiness), participation in discussions, collaboration skills/team player, confidence and ease of manner.
- 7) **Classroom Presentation Practical Skills:** Demonstrate lesson preparation with clear, logical and accurate content, good voice enunciation/clarity/volume/pace/pitch, good nonverbal communication (gestures and body language), effective visual aids, well-timed presentation(s) with introduction, conclusion, demonstration, clarity and use of notes, use of multiple pathways techniques and ease in handling questions.
- 8) **Land Drill and Water Drill Teaching Practical Skills:** Demonstrate good class positioning, control and positioning of safety boat, demonstration skills, effective on-the-water communication and evaluation and feedback technique.

9) Attendance at all portions of the course including both in-person and online.

10) The Instructor Trainer's Overall Evaluation

D. Course Materials

There are approximately 400 pages to read. Plan on studying prior to and each night of the course. Instructor candidates should have the following materials:

- 1) *Small Boat Instructor Guide for Learn Sailing Right! Beginner*
- 2) *Basic Powerboating, Safety and Rescue*
- 3) *Learn Sailing Right! Intermediate Sailing*
- 4) Review questions (Found in this Instructor Candidate Evaluation Booklet)
- 5) Other handouts and course information as applicable.

Certification of Small Boat Sailing Level 1 Instructors: Instructor Certification is valid for **three years** when the instructor maintains current First Aid, CPR, SafeSport a US Sailing membership and holds a current SafeSport Certificate. Instructors are required to recertify every three years to maintain certification:

<http://www.ussailing.org/education/recertification/>.

Learn Sailing Right: Instructor Guide / Learn Sailing Right: Intermediate

Review and Sample Test Questions

SHORT ANSWER: Answer the following review questions based on information found in *Learn Sailing Right: Beginner / Intermediate*. After you have answered the questions, double-check your knowledge by referencing the correct answers as noted in parentheses, e.g., (3) immediately following each question.

Questions for Discussion

- 1) Describe how to rig a mainsail in 7+ steps. (*IG Ch. 8*)
- 2) What force on a sail causes a sailboat to move? Does wind direction or sailing position change that force? (*IG Ch. 4*)
- 3) Describe how you would teach a student to sail close-hauled rather than on a reach. What are the significant factors which indicate that a sailor is staying close-hauled? (*IG Ch. 5*)
- 4) What are the significant differences between tacking and jibing? What should students do differently when tacking or jibing? (*IG Ch. 11/12*)
- 5) What are the 3 most important ingredients to a successful mooring landing? (*IG Ch. 14*)
- 6) Describe the basic right-of-way rules. What is an effective way of teaching beginning students to avoid collisions? (*LSR-I p. 55*)
- 7) List 6 sail shape controls and describe their function. (*LSR-I pp. 17-22*)
- 8) Describe how "lift" makes a sailboat move forward. (*LSR-I pp. 22-24*)
- 9) Describe the steps to roll tacking and roll jibing. (*LSR-I pp. 33-37*)
- 10) List 7 factors that can cause a windward capsize. (*LSR-I p. 38*)

Sample Test Questions - Multiple Choice – Circle the best answer from the options presented

- 1) What does a properly sailed boat use to steer? (*IG Ch. 10; LSR: I pp. 25-33*)
 - a. Rudder, body weight and sail trim.
 - b. Rudder, jib trim and body weight.
 - c. Rudder, boom vang and sail trim.
 - d. Rudder, mainsail and centerboard.

- 2) Why would you depower a mainsail? (*LSR: 1 pp. 16, 17, 25, 26, 27*)
 - a. Eliminate excessive heel.
 - b. Correct weather helm.
 - c. Increase crew comfort.
 - d. All the above.
- 3) What is the no-go zone? (*IG Ch. 5*)
 - a. A section of water where there is not any wind.
 - b. An area into the wind in which a boat cannot produce power to sail.
 - c. The leeward side of a dock.
 - d. Dangerous waters.
- 4) Vertical wrinkles along the luff of the mainsail indicate too much of which sail control? (*LSR: 1 p. 18*)
 - a. Halyard or cunningham tension.
 - b. Outhaul tension.
 - c. Mainsheet tension.
 - d. Boom vang tension.
- 5) What does "balance" on a small dinghy mean? (*LSR: 1 p. 24*)
 - a. Skipper and crew must sit on opposite sides.
 - b. Sails, centerboard and rudder are adjusted so the boat will sail forward in a straight line.
 - c. Main and jib are trimmed in tight.
 - d. Centerboard is halfway down.
- 6) Which knot is best for putting a "stopper" at the end of the jib sheet? (*IG Ch. 14*)
 - a. Two half hitches.
 - b. Bowline.
 - c. Clove hitch.
 - d. Figure 8.
- 7) What causes a sea breeze? (*LSR: 1 p. 13*)
 - a. A front passing offshore.
 - b. Water temperatures that are warmer than land.
 - c. Land temperatures that are warmer than water.
 - d. Approaching rain squalls.
- 8) What is the wind felt by a person near a stationary object such as a tree flag, smokestack or motionless boat called? (*LSR: 1 pp. 10-11*)
 - a. The apparent wind.
 - b. The velocity.
 - c. The actual wind.
 - d. A header.

Basic Powerboating, Safety and Rescue

Review and Sample Test Questions

SHORT ANSWER: Answer the following review questions based on information found in *Basic Powerboating Safety & Rescue*. After you have answered the questions, double-check your knowledge by referencing the correct answers as noted in parentheses, e.g., (3) immediately following each question.

Summary Review Questions

- 1) The most popular type of propulsion for safety boats is the outboard engine. List the main difference between 2-stroke and 4-stroke engines and describe the benefits of each. (*BPSR Ch. 3*)
- 2) List 4 precautions to take while fueling outboard engines with portable tanks. (*BPSR Ch. 3*)
- 3) Before heading out for a lesson on the water, how should you evaluate and prepare the boat? Include in your answer safety equipment, starting procedures and personal gear. (*BPSR Ch. 4*)
- 4) List the components of a daily checklist for outboard motors. (*BPSR Ch. 3*)
- 5) There are 2 systems primarily responsible for the operation of outboard gasoline engines - the fuel systems and electrical systems. List at least 4 points from each system to check if the engine quits running or won't start. (*BPSR Ch. 3*)
- 6) Describe the procedures for a cold start. Which step can you most likely eliminate when starting a warm engine? (*BPSR Ch. 4*)
- 7) Identify the 3 "speed-modes" for a small powerboat and 2 characteristics of each mode. (*BPSR p.24*)
- 8) Identify 4 types of turns you might be required to make while operating a safety boat and describe the implications of each. (*BPSR p. 24*)
- 9) Describe 4 elements to be aware of when holding position or maneuvering and how you might counter for them. (*BPSR p. 29*)
- 10) Describe 3 methods for maneuvering away from a dock. (*BPSR p. 38*)

Sample Test Questions - Multiple Choice – Circle the best answer from the options presented

- 1) If an engine does not start or it stops running, what is one of the recommended things to check? (*BPSR p. 7*)
 - a. Your running lights.
 - b. The air vent on the fuel tank.
 - c. The flywheel.
 - d. The timing sequence of the engine.

- 2) What will you not need to do if restarting a two-stroke engine has been running for a while? (*BPSR Ch. 3*)
 - a. Use a “kill” cord.
 - b. Mix oil into the fuel.
 - c. Use the choke.
 - d. Use the cooling system.

- 3) What is the towing method least suitable for confined areas? (*BPSR Ch. 12*)
 - a. Herringbone.
 - b. Double line tow.
 - c. Pram variation.
 - d. Alongside tow.

- 4) What is true of boats with fixed propellers and rudders? (*BPSR Ch. 3*)
 - a. The outboard is turned to move the boat.
 - b. The directed thrust is used to steer the boat.
 - c. Water has to be moving over the rudder to turn the boat.
 - d. The propeller has to be stopped to turn the boat.

- 5) What can aid a boat in leaving from the windward side of a dock? (*BPSR p. 38*)
 - a. Spring line.
 - b. Anchor line.
 - c. Tow line.
 - d. Bow line.

- 6) What is the term when using an anchor to pull a grounded boat to deeper water? (*BPSR p. 82*)
 - a. The hoist and furl.
 - b. A reef and steer.
 - c. Kedging.
 - d. Fluking.

Personal and Interpersonal Skills

Skill	10 Excellent	9-8 Good	7-0 Not Passing
Professional Conduct	Presents self in a professional way (prepares, takes the material covered seriously, is attentive to and respectful of IT and other ICs) throughout the course.	Presents self in a professional way (prepares, takes seriously the material covered, is attentive to and respectful of IT and other ICs) for most of the course.	Presents self in a professional way for little or none of the course.
Punctuality	Arrives well in advance.	Arrives on time.	Consistently arrives late for many parts of the course.
Leadership Skills	Takes initiative and motivates others to act in professional manner through actions and/or words.	Self-motivated and supportive of group initiatives. Acts professionally most of the time but may not take lead.	Never undertakes a leadership or supportive role of group initiatives.
Open-minded	Is open to and embraces alternative approaches and differences of opinion.	Is open to some alternative approaches and differences of opinions.	Is unaccepting of approaches / opinions that differ from own. Resistant to feedback and criticism.
Positive Attitude	Always demonstrates through words and actions a positive attitude throughout the course.	Frequently demonstrates through words and actions a positive attitude for most of the course.	Demonstrates through words and actions a positive attitude for little or none of the course.
Logistical Management	Demonstrates a high degree of respect for equipment, facility and the environment.	Demonstrates a reasonable respect for equipment, facility and the environment.	Demonstrates a low degree of respect for equipment, facility and the environment.
Professional Appearance	Is dressed appropriately, wears shoes and presents him/herself in a professional way throughout the course.	Is dressed appropriately, wears shoes and presents him/herself in a professional way for most of the course.	Is dressed appropriately little of the time, wears sandals and presents self in a professional way for little or none of the course.
Participation in Discussions	Is always prepared, participates actively and contributions reflect understanding of the material on multiple levels.	Participates actively most of the time and contributions reflect basic understanding of the material on multiple levels.	Participates little and contributions do not relate to material and reflect little or no understanding of material.
Collaboration Skills (Team Player)	Works well with others, shares ideas/insight, supports other ICs in their efforts and provides meaningful feedback throughout the course.	Works well with others, shares ideas/insight, supports other ICs in their efforts and provides meaningful feedback for most of the course.	Does not interact with other ICs, participates minimally in group activities and provides little help with daily responsibilities.
Effort Preparation	Well-prepared for all presentations & evaluations.	Prepared for presentations and evaluations but lacks effectiveness or application of US Sailing training.	Does not demonstrate adequate preparation for multiple presentations or evaluations.

This is a PASS/FAIL section.

A *Not Passing* grade in any element above (7-0) will result in an automatic failure for the course, even if all other elements add up to a “passing” grade.

Scores should still be tallied and reported.

Chalk Talk Presentation(s)

Skill	10 Excellent	9-8 Good	7-6 Needs Improvement	5-0 Not Passing
Lesson Plan, Preparation and Time Management	Completely prepared and obviously practiced. Narrows topic well and fits presentation within allotted time.	Well prepared but might have needed/benefited from more practice. Mostly narrows topic and comes close to fitting presentation within allotted time.	Somewhat prepared, but it is clear that practice and preparation were lacking. Some attempt to narrow topic but exceeds allotted time.	Does not seem at all prepared to present. Does not narrow topic and greatly exceeds allotted time.
Clear Purpose-Value Statement	Purpose-value statement is clearly articulated and provides rationale for study of topic.	Purpose-value statement is unclear though rationale for study of topic is evident.	Purpose-value statement is unclear, and rationale is missing.	No purpose-value statement is made.
Content	Content is presented in an appropriate, logical, accurate and clear way.	Content is presented in an appropriate and accurate way though somewhat illogical and lacking clarity.	Content is illogical in sequence, has some inaccuracies, and presentation lacks focus, and clarity though main points are discernable.	Content is difficult to follow or understand due to inaccuracies and lack of clarity.
Voice Quality (volume, tone), Clarity & Enunciation	Volume heard by all audience members throughout presentation. Speaks clearly and distinctly all of the time and uses appropriate and accurate vocabulary.	Volume is loud enough to be heard by most audience members most of the time. Speaks clearly and distinctly most of the time but does not use appropriate and accurate vocabulary consistently.	Volume is loud enough to be heard by some audience members some of the time. Speaks clearly and distinctly some of the time. Mispronounces some words, lacks accurate vocabulary.	Volume too low to be heard by audience members. Often mumbles or cannot be understood and/or mispronounces words and uses inappropriate vocabulary.
Nonverbal Communication (gestures, body language)	Gestures and body language enhance presentation and generate a strong interest in and enthusiasm about the topic.	Gestures and body language sometimes contribute to presentation and generate interest in the topic.	Gestures and body language do little to contribute to the presentation.	Gestures and body language distract from the presentation.
Visual Aids	Uses several props/visual aids that show considerable work/creativity which make the presentation better.	Uses a prop/visual aid that shows work/creativity, and which makes the presentation better.	Uses a prop/visual aid that makes the presentation better.	Does not use props/visual aids or uses aid that detracts from the presentation.
Questioning Techniques Handling Questions	Shows full understanding of the topic and is able to accurately answer questions posed. Frequently engages students, using multiple questioning techniques effectively.	Shows a good understanding of the topic and is able to accurately answer most questions. Occasionally engages students using a questioning technique.	Shows a good understanding of parts of the topic and is able to accurately answer some of the questions posed. Asked some questions, but not to useful effect.	Does not seem to understand the topic very well and is unable to accurately answer questions. Does not ask questions.
Kinesthetic Involvement	Engages the group directly and in an interactive (kinesthetic) and meaningful way with the material.	Engages the group directly with the material.	Makes some effort to engage the group in an interactive (kinesthetic) way with the material though the connection is unclear.	Makes no effort to engage the group in an interactive (kinesthetic) way with the material.
Multiple Pathways	Tries to and succeeds at presenting information in a way that appeals to multiple learning styles.	Attempts to present information in a way that appeals to multiple learning styles but relies too heavily on one style.	Makes little effort to appeal to multiple learning styles.	Merely presents information in a didactic, lecture-style approach.
Closure Comprehension Check	Effectively summarizes presentation and asks good questions to probe for understanding.	Attempts to summarize presentation and questions but relies too heavily on one style.	Offers either summarizing comments or questions, but not both.	Offers no summarizing comments or questions.

Land Drills

Skill	10 Excellent	9-8 Good	7-6 Needs Improvement	5-0 Not Passing
Lesson Plan, Preparation and Time Management	Completely prepared and obviously practiced. Fits presentation within allotted time.	Well prepared but might have needed/benefited from more practice. Comes close to fitting presentation within allotted time.	Somewhat prepared, but it is clear that practice and preparation were lacking. Exceeds allotted time.	Does not seem at all prepared to present. Greatly exceeds allotted time.
Class Positioning, Control and Group Involvement	Positions the class accounting for environmental variables and restrictions. Arranges 100% student involvement and manages the group appropriately.	Fully engages the group and offers adequate interaction but may not position or control the group. Involves most students and manages most of the group appropriately.	Partially engages the group and may not position or control the group. Leaves some students uninvolved, mismanaging the whole group.	Fails to appropriately engage the group and/or fails to adequately position and control the group. Makes no effort for whole group involvement and/or mismanages the group.
Clarity of Directions and Demonstration Effectiveness	Provides clear directions suitable for the skill presented. Provides clear demonstration of the land drill for students.	Direction lacks clarity but the skill is still understandable. Demonstration lacks clarity but the skill is still understandable.	Skill is not adequately explained but the demonstration is accurate. Demonstration does not aid in the understanding of the drill.	Skill lacks adequate or correct explanation and demonstration. No demonstration conducted.
Presentation Effectiveness	Participants fully comprehend the drill and are able to perform the skill correctly.	Participants may perform the drill correctly but do not demonstrate comprehension.	Participants have difficulty performing the drill or do not demonstrate comprehension.	Participants have difficulty performing the drill and do not comprehend the drill purpose.
Diagnoses Student Errors	Correctly identifies and prioritizes student errors.	Correctly identifies some student errors.	Occasionally identifies student errors.	Doesn't identify or prioritize student errors.
Feedback Techniques	Provides BOTH positive reinforcement and fault correction to all members of the group.	Provides either positive reinforcement or fault correction to all members of the group.	Provides only positive reinforcement to all members of the group.	Provides neither positive reinforcement nor fault correction to all members of the group.
Handling Questions	All questions are answered accurately and effectively with feedback appropriate to the skill level. Conducts effective comprehension check on all students.	Most questions are answered accurately and effectively. Conducts comprehension checks on most students.	Unable to adequately answer many questions or is confused by questions and unable to offer feedback. An attempt is made for some comprehension checks.	Confuses issues and is unable to adequately answer questions or provide additional information on the topic. Does not perform any comprehension checks.
Effectively Prepares Students for Water Drill	Provides direct correlation and examples between land drill and water activities.	Provides partial correlation and examples between land drill and water activities.	Provides either correlation or examples between land drills and water activities.	Does not adequately provide correlation or examples between land drills and water activities.
Setup/ Execution of the Drill	Use of real elements, effective drill set-up, engages students in activity as intended, isolates correct skill.	Drill is set-up for effective instruction but may lack realism or use of elements.	Drill set-up disconnected from desired skill, does not utilize elements.	Drill has no connection to water drill.
Nonverbal Communication	Gestures and body language enhance presentation and generate a strong interest in and enthusiasm about the topic.	Gestures and body language enhance presentation. More enthusiasm would improve interest in the topic.	Gestures and body language distract from the message of the presentation.	Gestures and body language impair the presentation.

Water Drills

Skill	10 Excellent	9-8 Good	7-6 Needs Improvement	5-0 Not Passing
Lesson Plan, Preparation and Time Management	Completely prepared and obviously practiced.	Well prepared but might have needed/benefited from more practice.	Somewhat prepared, but it is clear that practice and preparation were lacking.	Does not seem at all prepared to present.
Group Control	Excellent control of entire group, with awareness of individuals inside the group (e.g., runaways, wearing life jackets and safety).	Satisfactory control of group, but lacking awareness of individual group members.	Group is marginally under control and additional or outside factors may result in loss of control. Fails to anticipate.	Loses control of the group or does not act to protect the safety of the group (e.g., channels, boat traffic).
Handling of Safety Boat	Comfortably and accurately operates a boat in close quarters and maneuvers both forward and reverse.	Operates a boat in close quarters and maneuvers in forward and reverse with moderate accuracy.	Operates a boat in close quarters and maneuvers, but with obvious discomfort or inaccuracies.	Unable to accurately or safely operate a boat in close quarters.
Positioning of Safety Boat for Effective Instruction	Effectively positions safety boat, allowing for group control and feedback.	Positions safety boat, allowing group control but not individual feedback or communication as appropriate.	Has difficulty positioning the safety boat or is frequently out of position to control the group and to communicate.	Does not position the safety boat appropriately or is unable to use the safety boat as an instructional tool effectively.
Communication (verbal, visible, audible)	Utilizes verbal, visual and audible techniques to communicate on the water effectively.	Utilizes two of three methods to communicate on the water but manages to direct sailors as necessary.	Has difficulty communicating with the group or individuals or does not use methods appropriately.	Fails to communicate with sailors on the water and is unable to adequately transfer knowledge on the water.
Set-up and Execution of Drill	Effectively sets-up drill and students perform drill correctly.	Effectively sets-up drill, but students struggle performs to drill correctly.	Sets-up drill slowly and students struggle perform drill correctly.	Doesn't set-up drill and students fail to perform drill.
Presentation Effectiveness	Drill effectively and successfully teaches students desired skills.	Drill is mostly effective in teaching desired skills.	Drill only marginally teaches desired skills.	Drill does not teach any desired skills.
Diagnoses Student Errors	Correctly identifies and prioritizes student errors.	Correctly identifies some student errors.	Occasionally identifies student errors.	Doesn't identify or prioritize student errors.
Feedback Techniques	Provides BOTH positive reinforcement and fault correction to all members of the group.	Provides either positive reinforcement or fault correction to all members of the group.	Provides only positive reinforcement to all members of the group.	Provides neither positive reinforcement nor fault correction to all members of the group.
Fluid Transitions	Uses time efficiently to keep students on task during "down-time" between drills.	Transitions between drills quickly, but students may not be left constructively.	Does not use time efficiently to keep students on task during "down-time" between drills.	Is not able to gain control of group between drills in a reasonable amount of time.

Candidate's Score for this Section = _____ pts. = _____ %

Safety Boat Skills

Skill	10 Excellent	9-8 Good	7-6 Needs Improvement	5-0 Not Passing
System, Equipment and Starting Checks	Identifies all legal and equipment requirements, checks all systems and uses appropriate starting procedures by engine type.	Uses appropriate starting procedures for engine type and identifies most of legal and equipment requirements.	Misses a significant number of legal or equipment requirements or uses inappropriate starting procedures.	Fails to identify a majority of legal or equipment requirements or fails to use safe starting procedures.
Kill Cord	Attaches cord in proper location.	Attaches cord but to not to the best location.	Attaches cord with slight prompting.	Fails to attach cord.
Leaving	Casts off and stows dock lines, maneuvers away from dock smoothly and stows fenders properly.	Improperly stows dock lines or fenders, but maneuvers away from dock smoothly and appropriately.	Properly stows lines and fenders but fails to maneuver away from the dock smoothly.	Improperly stows lines or fenders and fails to maneuver away from the dock smoothly or safely.
Docking	Brings the boat to a full gentle stop alongside a dock within 3 feet of a pre-designated spot and secures the boat properly.	Brings the boat to a full gentle stop within 6 feet of a pre-designated spot and secures the boat properly.	Fails to bring the boat to a full or gentle stop at the dock but demonstrates proper technique to secure the boat.	Fails to bring the boat to a full or gentle stop at the dock and fails to demonstrate proper technique to secure the boat.
High Speed Maneuvering	Comfortably and accurately directs a boat through planing turns and other high-speed maneuvers.	Directs a boat through planing turns and high-speed maneuvers with moderate comfort or accuracy.	Directs a boat through planing turns and high-speed maneuvers but with obvious discomfort or inaccuracies.	Unable to bring a boat through planing turns and high-speed maneuvers with an adequate degree of accuracy.
Upcurrent/Upwind Position Hold	Maneuvers to a position directly upwind or upcurrent of a buoy and holds bow-to position until released.	Maneuvers to a position directly upwind or upcurrent of a buoy and holds bow-to position, but for less time than directed.	Maneuvers to a position directly upwind or upcurrent but cannot hold a bow-to position.	Unable to maneuver to a position directly upwind or upcurrent of a buoy in a bow-to orientation.
Pivot Turn	Turns the vessel at least 180° within 1-2 boat length space using smooth throttle transitions between forward & reverse.	Turns the vessel at least 180° within 1-2 boat length space but with occasional grinding or rough transitions.	Turns the vessel 180° within 1-2 boat length space but with frequent grinding or rough transitions.	Unable to turn the vessel 180° within 1-2 boat length space.
Backing	Proficiently maneuvers the boat backwards without losing directional ability or swamping. Turns to look where they are going.	Maneuvers the boat backwards but may lose some directional control or takes limited water over the transom. May not look where they are going all the time.	Takes significant water over the transom while maneuvering backwards but maintains overall control. Does not turn to look where they are going.	Loses control while maneuvering the boat backwards.
Anchoring/Making Fast to a Mooring	Positions boat in a defined location, correctly deploying the anchor, then recovers and stores the anchor. Or, retrieves a mooring and successfully casts off.	Demonstrates the appropriate skills, but with some difficulty or with numerous attempts.	Has difficulty positioning the boat or struggles to accurately set and retrieve an anchor or secure to a mooring.	Fails to position the boat and is unable to set or retrieve and anchor or secure to a mooring.
MOB Recovery	Executes proper approach and retrieval techniques swiftly and with accuracy.	Executes proper approach and retrieval techniques, but with reduced accuracy or swiftness.	Has difficulty with the approach or executes poor retrieval techniques.	Is unable to execute a proper approach or retrieval or is unsafe in any attempt.

Candidate's Score for this Section = _____ pts. = _____ %

Any element in this section receiving a score of 7 or below automatically receives a POI, even if all other elements add up to a "passing" grade.

Sailing Skills

Skill	10 Excellent	9-8 Good	7-6 Needs Improvement	5-0 Not Passing
Proper Attire and Life Jacket Use	Life jacket, in excellent condition, worn correctly at all times. Wears appropriate sailing gear and shoes.	Life jacket, in good condition, worn correctly most of the time. Wears appropriate sailing gear and shoes.	Life jacket, in unacceptable condition, worn correctly some of the times. Sometimes wore appropriate sailing gear and shoes.	Unprepared for course, incorrect or missing gear, or repeatedly failed to properly use life jacket.
Preparation & Rigging	Rigs quickly and with no discernable need for assistance.	Main/jib halyards properly secured with head of main started in mast track. Sheets led correctly with stopper knots, thru-hulls secured.	Rigs and prepares for sailing slowly and with uncertainty and needs to adjust all controls correctly.	Slow / incorrect rigging and frequent requests for assistance. Halyard(s) not cleared. Forgets stopper knot(s) in sheet(s).
Use of Sail Controls	All halyards and control lines tensioned appropriately for conditions.	Requires little instruction or reminder for proper halyard and control line tensioning.	Requires repeated instruction or reminders for proper halyard and control line tensioning.	Does not fully comprehend or repeatedly fails to implement proper halyard and control line tensioning.
Leaving a Dock or Beach	Demonstrates ability and comfort departing from dock / beach in all conditions / directions.	Correctly estimates wind and current direction and strength and launches boat appropriately for most conditions.	Movements of weight, sails and tiller are awkward. Departure is not smooth and fluid.	Misjudges departure, boat sails back into dock / beach or obstructions.
Sailing Backwards	Adjustment of tiller is smooth, boat sails in straight line. IC is able to avoid obstructions/other boats over a distance of at least 15 boat lengths.	Steers boat looking at desired course, not the tiller, and holds course over a distance of at least 15 boat lengths.	Understands and demonstrates sailing backward but falls off and has to restart process occasionally.	Never gets boat sailing backward for any consistent time.
Proper Use of Tiller Extension	Appears completely comfortable and at ease in use of tiller extension. Exchange of tiller/mainsheet through tacks and jibes is fluid.	Holds tiller extension in front of chest (like a microphone). Steering is smooth through turns and along a straight line.	Appears uncomfortable using tiller extension, holding tiller extension at side (like a frying pan). Occasionally drops tiller extension.	Does not consistently use the tiller extension, alternately holds tiller on some points of sail, or holds tiller extension near universal.
Starting, Stopping and Speed Control	Demonstrates quick adaptation to boat and appreciation of effect of weight, trim and rudder to control boat on any point of sail. IC uses weight to accentuate acceleration.	Sails on beam reach maintaining a steady course, using sails to control speed (luffing and/or over sheeting) to slow down, trimming correctly to accelerate.	Adjustment of sails and weight to aid in starting, stopping and control the speed of the boat is not smooth. Trim is inconsistent through maneuvers.	Fails to demonstrate understanding as to how to start, stop or control speed of boat.
Safety Position / Hove To	Holds safety position sails luffing completely, eases vang to facilitate.	Holds safety position sails luffing completely.	Fails to keep sail luffing completely and boat continues to sail forward occasionally.	Fails to keep boat in safety position with sails luffing.
Getting Out of Irons	Quickly backs sails, tiller toward desired heading.	Backs jib to desired side and waits for the boat to respond.	Occasionally struggles to get boat out of irons.	Cannot get boat out of irons.
Tacking	Smooth, steady turn. Turn ceases when boat is on close-hauled heading on new tack. Helmsman tacks facing forward, exchanges tiller/main sheet behind back. Boat is rolled very well.	Completes tacks in 90 degrees, but sails are occasionally over/under trimmed going through and completing tack.	Completes turns through more than 120 degrees and has to adjust direction to resume close hauled course. (e.g., uses the tiller instead of the extension to steer boat through the turn).	Struggles to complete tack. (e.g., faces backwards, drops tiller).

Any element in this section receiving a score of 7 or below automatically receives a POI, even if all other elements add up to a “passing” grade.

Sailing Skills (continued)

Jibing	Jibe is completed smoothly, w/boom under control, turn is completed before boat sails a course higher than a reach. Boat is rolled effectively.	Demonstrates awareness of boat's heading going into and coming out of the jibe. Main is occasionally over trimmed through the jibe.	Jibes through 180 degrees. Uses the tiller instead of the extension to steer the boat through the jibe.	Struggles to complete jibe. (e.g., faces backwards, drops tiller).
Steering with Weight and Sails	Demonstrates correct fore/aft and athwartships weight placement. Moves smoothly, shifting weight appropriately to assist turning the boat in coordination with sails to intended new course without using the rudder, or to help adjust helm conditions.	Demonstrates correct fore/aft and athwartships weight placement. Moves weight and trims sails to assist turning the boat but uses too much rudder at times.	Uses the rudder more than weight movement and sail trim to turn the boat. Does not appear to understand how moving weight will assist in correcting helm conditions.	Exclusively uses the rudder to steer the boat. Sails with excessive lee / weather helm.
Sail Trim Upwind	Trims and adjusts sail controls (sheets, outhaul and halyard) as appropriate for wind conditions.	Trims and adjusts gross sail controls (sheets) as appropriate, but has difficulty with fine controls (e.g., outhaul, halyards).	Has trouble adjusting gross sail controls for upwind sailing. Does not trim sails properly when transitioning between points of sail.	Does not effectively control sails when sailing upwind or when transitioning between points of sail. Does not use fine sail controls correctly.
Sail Trim Downwind	Trims and adjusts sail controls (sheets, outhaul and halyard) as appropriate for wind conditions.	Trims and adjusts gross sail controls (sheets) as appropriate but has difficulty with fine controls (e.g., outhaul, halyards).	Has trouble adjusting gross sail controls for downwind sailing. Does not trim sails properly when transitioning between points of sail.	Does not effectively control sails when sailing downwind or when transitioning between points of sail. Does not use fine sail controls correctly.
Judging Laylines	Consistently sails the shortest course to destinations and does not over-stand or miss marks.	Has some problems judging tacking angles and may over-stand or miss marks.	Often misses or over-stands marks and has difficulty recognizing appropriate tacking angles.	Consistently over-stands or misses a given destination or mark.
Capsize Recovery	Able to perform scoop and capsize recovery techniques quickly and efficiently.	Performs an adequate scoop and capsize recovery, but with some difficulty.	Has trouble performing a scoop and capsize recovery, but completes the task.	Does not complete a capsize recovery or a scoop recovery correctly.
Awareness Outside the Boat	Is aware of and responds to other boats, marks, shore line and wind while sailing.	Is aware of but may not respond quickly or correctly to boats, marks, shore line and wind.	Sometimes becomes distracted and does not track or respond quickly to outside influences.	Does not demonstrate awareness of outside influences or does not respond appropriately.
Ability to Predict Wind Effects	Sees, predicts and prepares for the wind conditions and effects.	Has some difficulty in predicting or changing boat setup for various wind conditions.	Predicts, but does not prepare for changing wind effects, or does not adequately monitor potential changes.	Does not predict or react to wind effects and changes.
Returning to the Dock	Performs appropriate controlled docking or beaching maneuver.	Performs appropriate docking or beaching maneuver but may lack in control.	Shows difficulty performing appropriate docking or beaching maneuvers.	Fails to perform appropriate docking or beaching maneuvers.
Securing Boat and Unrigging	Always executes appropriate tie-up, securing and unrigging techniques.	Usually executes appropriate tie-up, securing and unrigging techniques.	Lacks skills in some areas of appropriate tie-up, securing and unrigging techniques.	Demonstrates little or no knowledge of tie-up, securing and unrigging techniques.

Any element in this section receiving a score of 7 or below automatically receives a POI, even if all other elements add up to a "passing" grad



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