



Instructor Supplement
to Employee Manual
Rich Jepsen

Instructor Supplement	1
to Employee Manual	1
Rich Jepsen	1
Introduction	5
EMPLOYMENT POLICIES	6
OCSC Instructor Category Policy	6
Club Managers	6
Core Instructors	7
Scheduling Priority for Core Instructors	7
Regular Instructors	8
On Call Instructors	8
Inactive Instructors	8
Criteria for inactive status:	8
Instructor Pay Scale	9
Dress and Appearance	9
SCHEDULE PROCEDURES	10
1. Summer-- March through October --	10
2. Winter-- November through February-	10
3. Leaves of absence –	11
Submitting Availability	11
Instructor Availability	11
Scholastic or Community Programs	12
Instructors Available For One Day Of A Weekend	12
Start and Finishing Times of Courses	12
Canceled Work	15
School Lunches	15
Professional Development	16
* US Coast Guard License	17
* US Sailing Instructor courses	17
* OCSC Drug Testing Policy	17
Auditing Policy	17
THE REQUIRED COURSES FOR AUDITING ARE:	17

TEACHING TECHNIQUES AND PROCEDURES	18
Your relationship with your students	18
Words to teach by.....	20
Proper Components of a lesson	21
Morning lecture guidelines and hints	21
Description of the course and purpose	22
Body Of Lecture	22
Instructor/Student debriefs at the End of a Lesson	22
Course Evaluations	23
For 2-5 Day Classes	24
Course Wrap-ups	24
Dealing with experienced sailors as students.	25
Demos vs. Practice vs. Critiques:	25
TEACHING PERSON OVERBOARD MANEUVER UNDER SAIL	26
Teaching the maneuver:	27
Criteria of performance	29
Basic Keelboat II	29
BC and BBC	29
Different procedures for different levels and different conditions	29
Actual differences in teaching styles and preferences by instructors	30
GYBING	32
MISCELLANEOUS PROCEDURES	32
Switching Helm Positions While Under Sail in Class	32
Position of crew while tacking the jib	33
Lifting/ Lowering motors while steering.	33
Reefing Procedures While Underway	33
Poor Weather Classes	34
Creative responses to Mother Nature when she is not at her best	34
DEALING WITH HEAVY WEATHER	35
STUDENT COMFORT AND CONFIDENCE	36
GUNG HO STUDENTS	36
DEALING WITH TOO LITTLE WIND	37
BASIC KEELBOAT I	38

BASIC KEELBOAT II	39
BASIC CRUISING I	39
BASIC CRUISING II	39
OTHER COURSES AT OCSC	40
Night Sailing Classes	41
MARINA PROCEDURES	41
Teaching Reefing At the Dock	41
OCSC Procedures for Slip Departure	42
BACK AND FILLS	43
COMMON CONCERNS OF STUDENTS	44
Safety Concerns	45
Unhappy Client	45
STUDENT ADVANCEMENT AND TESTING PROCEDURES	46
Training Cards	46
Grading System on the Cards	46
OCSC Certification guarantee BK, BC, BBC	47
Addendum by Phil Shull	49
Final Words	51

Introduction

Dear OCSC Instructor:

Welcome to the most talented staff of sailing instructors in the country!! You have been through as thorough an evaluation as exists, and found to have the range of skills required to teach on San Francisco Bay, for the best school in the country, OCSC SF Bay Sailing School. We hope you enjoy your time here and find it as enriching as we do.

This supplement to the employee manual has been created to assist you with the parts of the experience here that are unique to your department. You will find policies and procedures that apply only to instructors as well as lots of advice on how best to present different aspects of the sport to your students. You'll also read and learn about dealing with students' fears and concerns and uses of teaching techniques and teaching philosophy to make your students' experiences as rewarding as possible. Please take the time to read this manual thoroughly before you start teaching and be sure to refer to it often. You will find it very helpful in dealing with the myriad of thorny problems you'll face as a sailing instructor. Again, welcome and Good Luck!!

EMPLOYMENT POLICIES

In this section you can find addition policies and procedures applying specifically to instructors. Feel free to ask questions of a manager or Core Instructor for clarifications.

OCSC Instructor Category Policy

A dependable and clear-cut policy is necessary concerning our scheduling procedures, the obligations and rights of the instructors, and the staffing requirements of OCSC. OCSC is a seasonal business and must maintain full capacity in the summer but keep its expenses reasonable in the slow season. Hours available to instructors drop in the winter to as little as 1/3 of those in the summer months.

Instructors need a dependable, long term sense of what hours of work they can expect from OCSC year round in order for them to make financial plans and decisions.

To manage this effectively and fairly, we have a system of distributing teaching hours that serves our needs as a business, as well as the needs of the staff. Instructors are separated into different categories:

1. Club manager
2. Core instructor
3. Regular instructor
4. On call instructor
5. Inactive instructor

Club Managers

OCSC club managers are permanent full time employees responsible for the day-to-day operation of the club. They are drawn from the instructor corps and remain as part of the teaching staff.

They may also have individual areas of responsibility such as operations, membership, training and fleet management. Some of them may have the authority to make decisions relating to the effective running of the club's activities including directing an instructors efforts or customizing a course syllabus due to student needs or weather concerns. Some of them may have staff responsibilities such as sales, customer service, IT support. One exists as the Head of Instruction, operating as the direct supervisor of the instructional staff.

As part of the teaching staff they are required to instruct for a minimum number of hours per month. They also give OCSC the flexibility to meet unscheduled client needs by being on site, should it not be possible to schedule an available instructor eligible for the hours. As instructors their position is analogous to that of a Core Instructor.

Core Instructors

Criteria for Core instructor status:

1. Must have USCG license and US SAILING Cruising Instructor Rating.
2. Must be qualified to teach the range of OCSC courses (including lectures) through the Bareboat Charter Course. All auditing completed and qualification to teach approved by the head of training.
3. Must be available three or more weekends per month and two or more weekdays per week.
4. Is expected to attend as many instructor meetings as possible.

There are a specific number of Core Instructor slots that are identified based on the volume of business OCSC experiences (this will be reviewed each fall to ensure that the core staff is large enough to handle the summer rush, but not so large that it becomes difficult to keep the core staff working in the winter.) As slots become available, instructors who meet the criteria and who make a formal request for core instructor status will be offered the slot in the order in which they qualified. Please ask for an application from the head of training.

To be offered a slot, the instructor must have worked as a regular instructor for a minimum of six months of the previous summer (see below for dates) having provided OCSC with the level of availability described in Criteria three above. Exceptions to this rule may be made for otherwise qualified instructors whose start dates are after April first and on or before the first of August.

Core Instructor status can be voluntarily relinquished at any time. Please inform the head of training. The status will be reviewed and may be revoked in cases where a core instructor has failed to comply with the necessary criteria.

Scheduling Priority for Core Instructors

1. Core instructors will be scheduled up to five days per week March-October.

(They may only be scheduled for more than five days a week with notice and/ or by mutual agreement.)

2. Core instructors will have priority in scheduling, especially November-March.
3. A Core instructor may take the November-February period off without affecting status.

Regular Instructors

Criteria for Regular Instructor status:

1. Must be available for a minimum of six days per month from March through October, two days of which are weekends or holidays. (This excludes specific vacations or leaves of absence when OCSC is notified in advance.)
2. Are asked to attend instructor meetings.
3. Must have US Sailing BK Instructor Rating within six months of employment and Cruising Instructor Rating within one year.
4. Must have USCG License within 3 months of employment.

Scheduling Priority for Regular Instructors

1. Regular instructors receive hours not assigned to core instructors.
2. Regular instructors with Cruising Instructor certification, due to their added flexibility, will receive hours first, then other regular instructors will be assigned the remaining hours of work on the basis of licenses and certifications.

On Call Instructors

Criteria for on call status:

Any instructor who can't teach the minimum number of days per month, but still wants to work occasionally, may still stay on staff, on call, but will not be afforded the same priority for hours, and will not receive the standard employee benefits that exist for the regular and core instructors, such as free boat use. On call instructors are encouraged to attend instructor meetings. On call instructors enjoy member benefits.

Inactive Instructors

Criteria for inactive status:

Any instructor who needs to be out of the scheduling loop entirely for more than a period of a month at a time will be placed on inactive status, without instructor benefits, until ready to return to regular or on call status. On call status will always be available. However, at some point we may have a full complement of staff, and be unable to immediately offer

an inactive instructor a regular instructor position. Inactive instructors wanting to reactivate would be notified first of any openings, before additional instructors are brought on board and they can have first right of refusal for the position.

If an instructor is inactive for more than one year, he or she will lose that priority, but will not need to go through reevaluation to come back on board when there is room on the roster. However before commencing to teach they will need to re-audit the core courses. Inactive instructors are invited to attend instructor meetings. Inactive Instructors enjoy OCSC member benefits.

If an instructor is released for performance reasons, or for violations of the Code of Conduct, he or she will not receive OCSC member benefits.

Instructor Pay Scale

OCSC instructors are paid according to the following guidelines:

- * When auditing a course one is qualified to teach, the training wage is \$6.75 per hour. When auditing or attending a course as a student, there is no auditing pay.
 - * New, unlicensed instructors are paid \$11.37 per hour for teaching base rate.
 - * When an instructor receives their license, their pay rises to \$15.00 per hour base rate.
- Whatever their base rate, instructors receive \$1/hour raises for the following accomplishment:
- * Basic Keelboat Instructor Certification

The following raises are only available to instructors with OUPV licenses or greater. Limited Operators are not eligible:

- * Cruising Instructor Certification
- * Attaining Senior Instructor Level (able to teach all courses and study halls up to Bareboat Cruising or Performance 1, with all auditing completed for those courses, with a USCG license and Cruising Instructor certification)
- * Senior Instructors who are with OCSC for five contiguous years as active instructors receive a \$.50/hour rise in pay.
 - When teaching Bareboat Overnight instructors receive \$370 for the two days. When teaching Coastal/Offshore Passage Making, instructors receive \$215 per day while away from OCSC.

Dress and Appearance

Although, we fully recognize that your teaching style and ability has nothing to do with your dress, students will make snap judgments about you based on your appearance. This means your effectiveness as a teacher will be based, to some degree, on how you appear to your students.

When you work for OCSC you receive up to three club shirts to wear teaching, depending on your availability. F/T instructors receive three, P/T instructors with three weekends per month commitment receive two shirts and those with the minimum of six days per month commitment receive one. You may purchase additional shirts at our cost.

The shirts you receive are yours to keep once you leave. In addition, after each year, you will receive one additional shirt to account for wear and tear.

In addition, you should wear good slacks, sailing shorts or Bermuda style shorts, sunscreen, sunglasses and functional deck shoes. Sweaters or Patagonia t-tops are appropriate for the conditions we have here and will still look neat and professional. Don't wear gym/swim trunks, sweatpants or shirts, T-shirts or dirty/torn clothes.

You are also required to own and wear professional sailing gear - functional and clean FWG, PFD, sea boots and sailing gloves. On occasion, you may use OCSC PFDs and Foulies if you forgot your gear at home. However, using that gear sends less than the professional image OCSC projects. Please avail yourself of the employee discount for sailing gear and purchase proper gear.

SCHEDULE PROCEDURES

1. Summer-- March through October --

OCSC will attempt not to schedule any instructor for more than five days in a row. If you are asked to do so, it will be appreciated if you can, but do so only if you feel you can provide the high level of skill, energy and patience at which you usually perform. If you need to find someone to work for you, you may ask any available instructor who is deemed qualified for the work for which you are scheduled. AS SOMETIMES QUALIFICATIONS ARE SUBJECTIVE, (CERTAIN PERSONALITIES OF STUDENTS, FOR INSTANCE) CLEAR THE SWITCH WITH THE HEAD OF TRAINING, A CLUB MANAGER, OR OFFICER BEFORE CONFIRMING IT.

2. Winter-- November through February-

The available hours in the winter will be divided among the club managers and core staff first, with any remaining hours split among the regular staff. Unfortunately, we can not guarantee even the core staff a set number of hours; however, by identifying the size of the core staff well in advance, we'll better be able to predict the number of hours available,

and, hopefully, all of you, according to your category, will know what to expect and can make plans accordingly. If, as a core instructor, you need to find someone to work for you, please call the schedule manager for the names and availability of core instructors, so that they may be offered the hours first.

3. Leaves of absence –

Leaves of absence while maintaining core or regular instructor status during the summer period are limited to the following;

- * Two weeks maximum for vacation time; to be used at the discretion of the instructor.

- * If Core Instructors wish to avail themselves of this, they are asked to notify the head of training at least sixty days in advance of the requested time. Applications for time off will be dealt with on a first come-first served basis. However OCSC will not unreasonably withhold permission except where there may be an overlap of requests.

- * Four weeks, but extendible by mutual agreement as necessary - for reasons of health or family emergency.

- Leaves of absence in the winter season are under no such restriction either for core or regular instructors. (November-February)

-

Submitting Availability

You are required to submit your availability schedule for a month by the 10th of the previous month. Once you have done so, and you are scheduled, you are responsible for that course. If you aren't scheduled, but Available, we will still expect that you are committed that day, unless you specifically call and remove yourself from the available, but not yet scheduled list. If you work five days per week, the other two days will be categorized as Scheduled Days Off.

There are three availability categories to select when filling out your availability calendar:

A - Available: you wish to be scheduled (see above).

OC - On Call: You do not wish to commit yourself, but you may be able to work if needed.

NA - Not available

S - Scheduled Day Off-This is used by the office staff to identify that you are already working a full load in a particular week.

Call once a week to reconfirm your schedule for the next week. Wednesday is the best day for the weekend and the weekdays of the following week.

Instructor Availability

If you are an instructor of any category at OCSC you are not allowed to teach sailing, or perform captained charters with any other commercial sailing school. Not only do the vast differences in philosophy make it difficult to make the transition in style from one business to the next, but the possibilities for schedule conflicts as well as transfer of privileged company information are too great.

Scholastic or Community Programs

It is within the spirit of the availability rule to allow you to teach sailing at yacht club programs, community programs or scholastic programs as long as this work does not interfere with your availability at OCSC (weekends especially).

Instructors Available For One Day Of A Weekend

Because we try to schedule the same instructor for both days of a two-day Course, if you are available for only one day, your schedule will usually be reviews, Private Lessons, lectures or PTs. If you want to teach the weekend-long courses, you may decide to work a weekend, instead of two separate days.

Start and Finishing Times of Courses

4. Day long and multiple day lessons- you are paid 15 minutes before the class to prepare for your class, and 15 minutes afterward to fill out cards.
5. 2nd instructor may have an early start time to prepare boats/buoys
6. Back-to-Back Reviews & PTs-You are paid 15 minutes before the first lesson to prepare for both lessons and 15 minutes after the second for filling out class cards.
7. For single session Reviews or PTs you get a total of 15 minutes prep/card completion time. You may insert it on your time card before or after the lesson.
8. Skippered Charters- You are paid one half hour before the charter to set up plus one 1/2 hour after to secure and clean up.
9. WNS, Moon Light Sails-You are paid from 5PM until 830PM.
 - 1700-1730 Boat set up
 - 1730-1800 Greet & help passengers with FWG-set sail NLT 1815
 - 2000-At the dock-walk passengers to club room
 - 2010-2030 Secure Vessel
10. Saturday BBQ sails
 - 1100 Boat set up
 - 1130-1200 Greet and help passengers with FWG
 - 1600 Back to the dock-walk passengers to the BBQ

1610-1630 Secure Vessel

11. Private lessons of any length. You are paid for the lesson time only.
12. For offsite lessons on students' own boats- you will be paid travel time of some sort if the location is significantly farther from your home than OCSC.

NOTE: It is critical from a consistency standpoint to finish your lessons ON TIME. Students need to be able to depend on the timing of our courses because they have lives outside of OCSC. Also, if some instructors' return on time and others come in late, students brought in on time might feel somehow shortchanged.

Course Name

Instr. Arrival Time

Class Time

BK Week (lead) ALL DAYS

8:45

9:00 AM

BK Week (second) DAY 1

9:00 AM

9:00 AM

BK week, (second) DAY 2

9:30 AM

9:00 AM

BK week, (second) DAY3-5

8:45

9:00 AM

BC Week

9:45

10:00 AM

BBC week

9:45

10:00 AM

BBC week Wednesday

8:45

9AM

OVERNIGHT

BBC 1

9:45

10:00 AM

BBC 2

8:45

9:00

OVERNIGHT

Perf 1 (Oct-Feb)

8:45

9:00

Perf 1 (Mar-Sept)

7:45

8:00

Perf 2 (Oct-Feb)

8:45

9:00

Perf 2 (Mar-Sept)

8:45

9:00

Small Boat Asymmetrical

8:45

9:00

Big Boat Asymmetrical

9:45

10:00 AM

Co-Nav

9:45AM or 645PM

10:00:00 AM or 7PM

Cel-Nav

9:45AM or 645PM

10:00:00 AM or 7PM

Nav 1, 2, 3 (Tuesday)

9:45AM or 145PM

10:00:00 AM or 2PM

Sea 1, 2, 3 (Tuesday)

9:45AM or 145PM

10:00:00 AM or 2PM

Nav 1, 2, 3 (Saturday)

9:45AM or 145PM

10:00:00 AM or 2PM

Sea 1, 2, 3 (Saturday)

9:45AM or 145PM

10:00:00 AM or 2PM

Seamanship under Sail

8:45

9:00

CPM

8:45

9:00

Morning Bay Review

9:45AM

10:00 AM

Afternoon Bay Review

2:00PM

2:00 PM

Private Lesson (on site)

class start time

TBD

Private Lesson (off-site)

includes travel from OCSC

TBD

Canceled Work

Due to the short-term and changing nature of class scheduling, your hours for a particular day may be canceled as late as the day of your session. You will be paid for 3 hours if you come in to teach and class is canceled after that point, if you are willing to work at any project we might have for you in the office or on the boats.

School Lunches

OCSC encourages students to bring their own lunches but provides lunch to them to keep them at school mentally as well as physically. It allows for a short lunch break that keeps the interest levels up and the instances of course delays down.

That said, it isn't a perfect system and won't suit everyone. However, there are certain procedures, which help to keep it a functional, helpful part of the program.

Please follow these guidelines when teaching:

Keep in mind, always, that our lunch is a back up for those students who choose not to bring, or forget their own lunches. So, if a student engages you in a conversation about lunch, please be sure to point out, politely, that OCSC is happy to have students bring their own lunches and will store them for students, if the lunch bag is labeled.

- * Set out sandwiches, help each student choose one and return them to Fridge IMMEDIATELY!!!

- * Regardless, stay positive about the lunch to your students. If you notice a problem, the managers will always listen to feedback about the lunch from you in private.

- * Be sure to let the office know if you're short of anything; we'll take care of it.

- * After lunch, ALWAYS bus your table and put all refuse and garbage in the trashcan. Generally, if you pitch in to do this, your students will follow suit. If you leave the area messy, then the following group of students will be forced to clean up just to eat, and will have a less than acceptable lunch experience.

- * Lunch is only provided for students in formal OCSC courses, not private lessons, reviews or practical tests. If you have students in a morning and afternoon review/PT, please advise them on places to catch a bite between the morning and afternoon session. That is a polite way to prevent them from assuming lunch is available to any student. If they push back and insist on eating OCSC's lunch, please accede to their desire with a smile.

Lunch break policy

- * Lunchtime periods vary widely depending on the class.

- * Lunch is provided for you. (Sandwiches, cookies, & chips) If you prefer something else, you may bring something and store it (labeled) in the downstairs refrigerator.

- For all day or weekend long courses, there is no lunch "break", because you must remain with your students. However, lunch and a 1/2-hour period are provided for you to eat with your students, so you can keep them energized. For multiple short sessions totaling six hours or more, you'll have at least a half hour to an hour unpaid break during the day. For sessions less than 6 hours you may not have a break.

Professional Development

OCSC will subsidize 50% of USCG license fees, Keelboat and Cruising Instructor courses, US SAILING instructor re-certification fees, US SAILING instructor membership, 50% of First Aid and CPR fees (when the course is held at OCSC). OCSC will provide all new instructors with a pre-employment drug screening required for employment but also useful for licensing.

*** US Coast Guard License**

All OCSC instructors are required to have a license for carrying passengers for hire. You have a three-month grace period while auditing and/or teaching in the classroom to complete this licensing process. You may be suspended if you do not present the Head of Training with a copy of your license within that time. OCSC provides training, subsidy and other support to your licensing effort. If you need advice about the steps involved in licensing, please contact the Head of Training.

*** US Sailing Instructor courses**

You are required to go through US Sailing's Basic Keelboat instructor course within 6 months, and Basic Cruising instructor course within one year. For details of these courses, see the Head of Training or visit www.ussailing.org . Coastal Passage Making, Coastal navigation and Offshore Passage Making are optional.

*** OCSC Drug Testing Policy**

- o OCSC is in full compliance with a Federal Regulation that requires all instructors to be enrolled in a random drug-testing program. This involves both an initial screening and random testing. You will receive an addendum to this manual describing in detail the program as well as your obligations as a licensed OCSC instructor. You are required to read it and comply with its procedures and rules.
- o OCSC pays for and schedules all drug tests. Also, when you are called for a random screening, you are required to submit to the screening within seven days of notification. You are paid two hours' time for your trouble. Your paperwork will include the proper lab to visit. However, if you live out of town, you may call the Maritime Consortium and ask for an approved alternate site. The seven day time limit still applies.
- o If you test positive, or fail to test properly within the time limit or by the federal guidelines, you will be reported to the USCG and may be suspended until the USCG approves you to return to work.

Auditing Policy

Any course you are qualified to teach and wish to teach must be audited first.

You are required to audit certain courses as part of the conditions of employment. If you have made it this far, you have demonstrated an ability to sail and teach at least to the Basic Keelboat level of US SAILING, using J24s here at OCSC.

THE REQUIRED COURSES FOR AUDITING ARE:

- * Basic Keelboat I -14 hours*
- * Basic Keelboat II -14 hours*-- plus Seamanship I and Navigation I -6 hours

- * These courses must be audited before your first day of teaching.
- * Basic Cruising I - 14 hours
- * Basic Cruising II - 14 hours plus Seamanship II and Navigation II - 6 hours
- * One Review each at BK & BC - 3 hours each
- * Both the J24 and Bareboat practical tests - 3 hours each**
- ** Generally, you will be a candidate as well as an auditor for the Bareboat level. Your instructor will evaluate your skills, as well as show you how to properly conduct a certification test, yourself. The instructor will then describe to the Head Instructor his/her perception of your ability or readiness to perform Big Boat activities.

TEACHING TECHNIQUES AND PROCEDURES

This section is, for the most part, a distillation of topics discussed at various instructor meetings throughout OCSC's history. They all are issues that are particularly difficult to manage and require more focus and explanation than is possible in the instructor syllabuses for the courses here at OCSC.

If you have been teaching sailing for years, these topics will be helpful reminders. If you are just starting out, they will be critical to your success, and will allow you to reach a high degree of proficiency as a teacher as soon as possible.

Your relationship with your students

In every interpersonal relationship there is a certain level of trust, however low or high. In all healthy and productive relationships, trust is a necessary component. In sailing instruction, it is even more critical. Below, I have outlined a presentation to help you think about Trust, its value to the student teacher relationship and how to enhance a relationship by earning the trust of your students.

Trust is a function of many things. However, in the sail training environment there are three key factors. They have been organized into an equation, called the Trust Equation, by a famous psychologist and management consultant. It was taught to me by one of our own, Larry Ledgerwood, and is as follows:

$$\text{Trust} = \frac{\text{Credibility} \times \text{Empathy}}{\text{Perceived Risk}}$$

Credibility is mainly composed of three important ingredients-Competence, Knowledge and Dependability. You must be competent at teaching and sailing, you must know what the student perceives you should know to be a

good sailing instructor, and, most importantly, you must do what you say you are going to do; in other words, be dependable.

Competence: If you are able to tie a bowline in boat rigging practice smoothly and easily, the students will be reassured about your competence. If you are able to tuck in a reef without help when the wind comes up quickly, you will add to the power of this ingredient. If you are unable to gracefully perform any maneuver you are teaching, you will lose their trust in your competence.

Knowledge: If you are able to describe how heeling affects weather helm, even though it is too advanced for the day's curriculum, then you add to the power of Knowledge to improve the students' trust of you. If you are uncertain why a student is struggling with a basic maneuver because you have an incomplete understanding of it yourself, then the students will trust you less with their learning and their safety.

Dependability: If you say you want them all to have a good time and, throughout the day, you are checking in with them about their fun quotient, and at the end of Day One, they had lots of it, then they will trust you to do the same tomorrow. If you say that you will be sure to answer a particular question from a student in a few minutes after you finish a lecture point, but you forget and never return to the issue, you will do damage to your credibility, even if your knowledge and competency are first rate.

My experience is that most students assume that our competence and knowledge are in place and must be proven wrong before they will stop trusting us due to that. However, it takes very little un-dependable behavior before the students will freeze you out and trust you with nothing. So be sure that you say what you are going to do and do what you said you would do.

Empathy: This is actually the most important controllable factor in this equation and it is also often the most overlooked. Students care most about whether your intentions are to serve their needs well, not how many sea stories you can tell or whether you know the curriculum better than anyone else. If someone is frightened, but is unwilling to say anything, you score tremendous Empathy Points if you pick up on their body language and calmly, carefully and respectfully ask them what you can do to ease their anxiety. Empathy means having more concern for others interests than your own. If someone expresses frustration with themselves, or the school, or you, you absolutely must ensure your entire being is committed to easing their frustration, whether valid or not. If you are able to provide that sort of unconditional support and care, you will become a great teacher, and you will earn the friendship of many of your students for life.

More than anything else at OCSC, You will find that this is the most powerful teaching tool you possess. Students may not be experts in what makes a competent and knowledgeable sailor, but they are all experts at determining whether someone is dependable and truly empathetic... It is where your emotional connection with your students starts and ends. Empathetic instructors with spotty advanced skills and knowledge (assuming a minimum needed to perform to OCSC standards) will always have happier, more enthusiastic students who are learning quicker than those instructors who rely totally on their sailing skill and knowledge and their teaching "methodology".

Perceived Risk: So, all of these factors are divided by the risk to which students feel exposed. For instance, when someone calls us up to get a brochure, how much risk do they feel? Other than being manipulated by a salesperson, not much. How much risk do they feel in Seamanship One? Other than the fear of being asked a question they don't know the answer to, not much as well. But, how much risk does the BK1 student feel when it is blowing 20 knots on the afternoon of day 1 and the rail is in the water and the boat keeps rounding up almost out of control? Tremendous amount.

So, does it follow that the amount of credibility, (knowledge, competency, dependability) and Empathy (putting students needs, enjoyment, and interests first) must be higher when the risk is higher?

When you are preparing for your lesson, always ask yourself: "What level of risk can I expect my students to experience today, given the lesson I am teaching?" "What should I do throughout the entire lesson to ensure that I am maximizing the amount of Trust my students have in me?" You will always be surprised and encouraged by the results of any efforts to improve the trust level between you and your students.

To try to codify the importance aspects of the healthy, trustful student/teacher relationship, I have created several short phrases for you to review and use within and outside of OCSC.

Words to teach by.....

1. Be Dependable. Do what you say you will do. Keep your promises.
2. A small promise not kept is more powerful than an important promise kept.
3. You don't need to be an expert on the topic as much as you need to be an expert on your students' needs. It is not enough to know their needs;

They must know you know.

"Students don't care how much you know until they know how much you care." (Steven Covey)

4. "Evaluate" is derived from the meaning: "to extract the value from something". Consider this definition when you evaluate someone. Look for the good stuff, especially the good outcomes.

5. Find value in everything your students say or do. "Assume good intentions." So even if people really screw up in what they do, assume good intentions on their part and you have a starting point for encouraging words and coaching from a positive perspective.

6. You must earn your students' trust every moment. And, as perceived risk goes up, so does the work involved to remain trustworthy. Risk is a part of the trust equation when the student feels it is.

Proper Components of a lesson

All lessons should include certain components, which serve as the spine of your lesson plan. You can change, add or subtract many parts of lesson plans, but these components should always exist in some form, regardless of the type or length of lesson.

1. Hearty Greeting and Personal Introduction With Each Student
2. Determining students' goals, desires and immediate objectives (be sure to log those in your head-remember- their interests and enjoyment are paramount!)
3. Describe Components and Chronology of the Lesson (what is ahead)-Make sure you emphasize that in order to learn, they must be having fun and your intentions are to make sure they enjoy themselves as much as possible.
4. Body of The Lesson, including presentation, reiteration and review
5. Encouragement and Praise continually
6. Student Performance Debrief (see below for description)
7. Course Evaluation (verbal or formal depending on type of course)
8. Course Wrap Up (informal for reviews, PLs, PTs; formal for full courses)

Knowing Students & Letting Them Know What To Expect Today

At the beginning of EVERY SINGLE LESSON, review, private lesson, P.T. or full course, you must first get to know your students, factor their needs into the lesson plan and then describe to them what they can expect in the course.

Describe in detail the components of the session in a chronological fashion, describing briefly why it is set up that way. Also mention that due to weather considerations or other factors, you may need to change the order of components.

Morning lecture guidelines and hints

The first lecture in a course is always the toughest due in part to the awkward nature of meeting new faces and developing a rapport with the

students. The first part of that lecture becomes even more critical. The first 10-15 minutes in a lecture determine its success. Here are some reminders about the things most likely to set you off on the right foot! Energy and Enthusiasm--start before the class and get pumped!

Board and classroom prepared (tables & chairs set up/lesson reviewed)

Greetings and introduction of OCSC and self

- a. Welcome all to OCSC and course
- b. Brief sailing history of yourself and 2nd/3rd instructor
- c. Getting to know students
- d. Ask each his/her name & ask for their application
- e. Whether they have sailed and how much
- f. Why they are taking course
- g. Any long term goals

Description of the course and purpose

- * Schedule for the two or five day
- * What your intentions are for them--Safety, Fun, Learning
- * What the students should know in the end
- * What will be covered in the lecture
- * Set up a transition from your introduction to the body of the lecture. Some argue that draws their attention to the matter at hand.
- * I'll try to use something I learned from one of the students about themselves to introduce the first topic. It helps to grab their attention to make the topic more relevant to them.

Body Of Lecture

No matter what is covered, make sure you allow time to review, check for understanding, and bridge (transition) into training on the water.

Instructor/Student debriefs at the End of a Lesson

Probably the most important part of a lesson is the debriefing at the end of a session. If this isn't performed in the most complete way, the whole lesson will have been a virtual waste of time. In addition to what ever you might discuss with your student, the following THREE things should be clearly and thoroughly covered at the end of a lesson:

- * WHAT THE STUDENT DID WELL & how well by comparison to the standard
- * WHAT THE STUDENT STILL NEEDS TO WORK ON -specifically, by skill set
- * IS OR IS NOT THE STUDENT READY TO MOVE UP TO THE NEXT LEVEL and if not, approx. how much and what type of training/practice will they need?
- * This last one is the most difficult. Problems that arise:
 - o The student and you want to keep the amount of money spent on lessons to a minimum. This is commendable, but it puts unnecessary pressure on you to move the student up, sometimes costing the student more in the long run.
 - o Make the point that you want this to be as cost effective for them as possible. Reassure them that you are making your recommendation based on

your experience as a teacher, and solely based on what is best for them educationally.

- o Our client base has a very large percentage of "high achievers" in their personal and work lives, but at the same time, some of them are only "average" sailing students. They therefore, sometimes react negatively or with surprise when told about the amount of review they may need before progressing to the next level. This is unavoidable to some degree as most students secretly hope and/or believe that they will learn sailing quicker than anyone else. If you explain to them that most of our students are very smart and that most of them need reviews, then they won't look at the review process as remedial training for slow learners but accept it as a natural and necessary progression to the next level of training.

- o You aren't sure how much time the student will need before he or she can progress. ----Feel free to admit you aren't sure. Present your wrap-up with the caveat that students don't learn in a measured, linear fashion, that there are plateaus of frustration with little progress, and flashes of insight with lots of progress. Your approximation of what training they'll need in order to progress is then a little easier for them to understand.

MOST IMPORTANT! Don't Chicken out!! Be as kind as possible, but don't put off necessary discussions out of a fear of confrontation. You'll only make more heartache and work for your fellow instructors down the line.

1. Sometimes I find I don't have enough time to do a thorough evaluation of each student. In the evaluation process, here are a few hints and ideas for maximizing benefit and streamlining the procedure.

- * In two-day classes, do evaluations both days. This makes for shorter, more effective evaluations.

- * If all students are doing reasonably well, feel free to critique them in front of each other-it's quicker, and the students have the benefit of hearing more about what is necessary to become a competent sailor, and learning from each other.

- * If you have done your evaluations before you returned to the dock, reiterate the major points just before you leave them at the end. This helps to reinforce what you said earlier and will be more likely to thought about/considered during their drive home.

- * When describing the course itinerary at the start of a class, be sure to include these things

- * You'll evaluate each student thoroughly so they know where they stand.

- i. They'll be able to evaluate you and us at the end of the program.

- ii. At the end of the 2 (or 5) days there will be a course wrap-up so they can sign up for lectures, get a chance to give feedback about the program, celebrate the step they've taken and get advice on what their next step should be.

Course Evaluations

Course Evaluations are a part of the system we use to gauge the quality of our service as a school as well as your effectiveness as an instructor.

We use short forms for each day of a multiple day class and for things like reviews and private lessons. We use a more formal sheet at the end of a full course and it is handed out and collected by the staff member performing the course wrap up.

You are required to hand them out to your students for any multiple day courses each day. You are welcome to hand them to students you had in a review or lecture if you feel they may have something constructive to say, or you know you just did a really good job.

After they are filled out, they are filed under your name in the top drawer of the file cabinet to the right of the instructor's table. Please read and initial them, putting them in the tray on the right labeled "Course Evaluations already reviewed"

If you receive an evaluation that is significant (either positive or negative) please talk to a Club Manager, or call him/her about it.

For 2-5 Day Classes

Please be sure to request that your students hand in Yellow Course Evaluations after the first day, and review them that afternoon or the next morning so that you can respond to any problems, complaints or constructive criticism. If there is a complaint of any significance, whether or not you feel it is well founded, be sure to find the club manager for the day and review it with them. It's important that we know when we have a client with a problem - whether perceived or real.

Course Wrap-ups

For full day or longer classes there is always a class wrap-up completed by one of the office staff. This includes Spinnaker, Bareboat and every first service BR or PT as well. It is our chance to get feedback on our program from our students whether they are members or retail clients and, more importantly, it gives them the opportunity to ask questions about their next steps and to receive the educational direction they need.

If you have ever listened to a Course Wrap Up, you know that it consists of 30% customer service logistics: explanations of tests, lectures and the like, 30% discussion of what they have accomplished in the context of the world of sailing, 30% getting feedback from the students on how the experience matched their expectations and 10% on the sort of discussions that might be described as Sales and Marketing.

It's important that you understand this because your presentation to the students about the nature of this wrap up will determine how interested they are and how open their aperture is for this very important information. We don't use common "sales" tactics on our students so it

should be very easy for you to describe the Course Wrap up as something that adds value to a high quality training experience; As something that ties a ribbon on the course and packages it with greater perspective.

It is your responsibility to advise your students that this will follow your end of the Class Debrief and to introduce the staff member charged with giving the wrap up. You must also inform the staff member of the results of your debrief with the students, so that he or she will know in advance who is ready for the next level, who needs review and who might need some extra or personal attention. When you touch base with the staff member, be sure to let them know whether you have completed your Debriefs and how much time you will need with the students before the staff member arrives.

If the staff member is delayed for a few minutes, please stay with your students and keep them involved until the staff arrives. That might include a discussion of more advanced classes, covering certain parts of the wrap up yourself or just casual conversation. Once you have introduced the staff member to your students, thank everyone for their participation and excuse yourself.

If your class ends after we are closed, ask the students to call us the next day for a Course Wrap Up.

Dealing with experienced sailors as students.

Experienced sailors can be much better students than those whose only sailing is with us; however, they also may require special treatment.

1. It is most important, before starting to know their sailing experience, why they are taking the course and what their goals are.
2. Carefully orient them to OCSC standards- Don't assume
3. Validate their ways of doing things as much as possible. Suggest OCSC way as an alternative, rather than "the only way."
4. Remember that their ego is on the line, and they will need careful handling and consideration of that fact. They will be more tense or defensive than they might otherwise be. Try not to let that bother you and be sure to factor it into your judgment of their performance

Demos vs. Practice vs. Critiques:

Although everything we teach is very important, certain topics are more difficult to learn than others and more critical to seamanship and safety. You must understand the relative importance of each topic so that when you are teaching it you can allot time accordingly. Think of each topic as either being a demo, a practice, or a critique. For example, Sail Change is a procedure that we demonstrate but do not practice. If we were to practice changing headsails three times so that each student could take each position, then we would spend the entire morning just pulling sails up and down.

Heaving to, on the other hand, is something each student will need to perform many times before they have mastered it. In addition it will be asked that they heave to on the practical evaluation. Therefore, Heaving to should be run as a topic for practice.

Topics that the students should already be familiar with should be critiqued after the fact rather than re-taught. For example, each time we leave the slip to go sailing, it is useful to assign one student to be in charge of marina procedures. Try to take a back seat and let the student make mistakes and learn from them (keeping an eye towards safety, of course.) This will be far more useful to them than having an instructor "managing" the procedure from the stern pulpit. This is an excellent way to prepare them for "taking command", as it forces them to rely upon themselves rather than the instructor. After the student has performed the maneuver, evaluate their performance as you would on a practical evaluation.

Communicate these differences to your students so that they understand the purpose of each drill and its relative importance.

Micro Teaching-- Defining It, Recognizing It and Preventing It

PROPOSED DEFINITION: When critiques, corrections and teaching input are given so often and in such detail by the instructor that the learning experience is hampered. Confidence is lost, the level of trust between student and instructor is damaged, retention rate goes down and/or frustration is unnecessarily increased.

EXAMPLE: An instructor teaching docking-- Reduce your throttle, ...come on, now, reduce it, no, no too much!...start turning into the slip, where's the wind? Where's the wind? Turn more,...more,...too much! Too much! Engine out of gear! NO! WAIT! Lower the throttle!!!

CAUSED BY: Impatience, instructor fatigue, complicated maneuvers, inadequate preparation of the students before asking them to perform. (all things the instructor is (must be) in control of....)

SOLUTION: It's important to realize that this is a very common mistake to make and you must constantly resist the temptation. Also, learn to recognize the behavior in yourself - if you aren't aware you're doing it, you'll have a tough time correcting your approach. If you hear yourself doing it, stop immediately, apologize to your students-they will already have recognized it.... And, ask yourself what caused you to do it and see if you can redirect your efforts. Sometimes, simply asking the students how they would like feedback and coaching gets you back on track!

TEACHING PERSON OVERBOARD MANEUVER UNDER SAIL

This maneuver is complicated and challenging to learn; Some would say even more difficult to teach. In addition to the detailed instructions in the

instructor syllabuses, below is a general treatment of the subject that you should find useful.

Teaching the maneuver:

On the board in the classroom-one approach

Draw in the wind direction, the victim, and the boat next to it with sails luffing on a close reach and work backward in this maneuver. Teaching the maneuver backwards from the end may help to focus more student attention on the final objective. Draw a line from the victim, perpendicular to the wind and ask students whether they can safely approach the victim from above this line. Draw in the leeward edge of the zone of approach and ask students if they can easily sail up to the victim from leeward of that line. Ask leading questions until all grasp the idea of a proper "zone of approach". Move the boat in and out of the zone of approach on the board to show students that it can be entered from any direction. Then, talk about how a sailor can determine wind direction and when the boat is in the zone of approach:

1. Windex
2. Wave trains
3. Wind on the face
4. Memorization of the feel & look of a boat on a close reach.

- a. Angle to the wind
- b. Angle to the wave trains
- c. Motion of the boat

5. Angles between the boat and victim/ boat and wind:

Describe how each of these looks/feels when the boat is in the zone of approach, headed for the victim.

6. As a final test, pointing the bow above the victim and checking to see if the sails can be filled and be luffed at will.

Now, cover the final two boat lengths of approach, emphasizing:

1. Heading at a point just upwind of the victim.
2. Keeping the victim in sight to the side of the boat to keep the bow from running it over (victim should first touch the boat aft of the shrouds.)
3. Being sure to put the helm to leeward to heave to at the pick up. Be sure to point out that if the boat tacks instead of heaves to, the boat was going too fast.

4. Putting the tiller to leeward will actually swing the stern closer. Now you can cover how to get the boat quickly and safely into the zone of approach by using the "Quick-turn". It's very important to mention that a properly executed "Quick-turn" maneuver looks little like the classic "Figure 8". Student confusion with the maneuver sometimes stems from their attempts to scribe an "8" in the water. Unfortunately, this is reinforced by the drawings in Sailing Fundamentals and US SAILING's Text. So, you need to warn them about the book as well.

1. Describe and draw the beam reach, the tack, and bearing off. Emphasize the purpose of each of these in positioning the boat quickly and safely

into the zone of approach. Point out that these procedures are an optimal way of placing the boat in the zone of approach, but not the only way.

2. Demonstrate options for recovery from a variety of mistakes such as not sailing away on a beam reach, or heading downwind too long after tacking.

3. Finally, cover the immediate responses to an overboard- the hail, appointing a lookout, heaving a PFD and placing the boat on a reach.

Emphasize:

1. The hails should be loud

2. Choose one person to be lookout & call them by name.

3. Do not rely on the lookout, ask them to count boat lengths, or tell you when to tack, head up, fall off or slow down. Use the lookout as a backup.

Glance at victim every few seconds throughout the maneuver

4. Have students actually heave a horseshoe ring every once in awhile (be sure to hose it off at the dock after the lesson).

5. The proper model is to sail no more than 3 boat lengths away from the victim. However, you may point out that BK level students will initially be unable to maneuver the boat successfully, staying within three boat lengths. Get them to work toward that goal constantly.

On the water

Before getting to the maneuver, your students need to work on their boat handling skills. The maneuver is a little like patting one's head and rubbing one's stomach, there is so much to do. The Big Tack, that 250 degree tack during the recovery maneuver, must be drilled substantially before having students consider the maneuver as a whole. Practice tacking 200 degrees from a beam reach to beam reach (apparent wind). The tack should be done the same way as normal, with the student waiting to cross the boat until after the main has crossed. However, they must be drilled on being sure to grab the main sheet and keep it from fouling as it is dragged across the boat by the boom. Review your Basic Keelboat 2 Syllabus for detailed instructions.

Have your students' then work on the final approach, practicing acceleration, deceleration, and getting used to increased leeway. After each student has had a couple of tries, work on going in and out of the zone of approach, then move to the complete maneuver; this way they'll focus more on the objective and less on the procedure.

Note: Different students like different coaching methods. Some want to be coached through every stage, while others want to try the whole maneuver and then hear feedback. Neither is inherently better than the other.

To address this, do the simple things. Before a maneuver, ask a student how he/she wants to approach it. If they wish to attempt the maneuver without help, then bite your tongue and let them give it a shot. Always ask permission to give advice and phrase your advice in the form of suggestions.

Regardless of the technique you use, occasionally ask how your student is receiving your coaching. "Is this advice helpful?" Do you need more input?, Less?, How can I better communicate?"

Criteria of performance

Be sure to describe to your students what the specific criteria of performance are at each level before they are asked to start learning and performing. In SPOB recovery drill, you need this more than any other, because of its complicated nature and due to the level of precision required at the pick up point. Below are criteria for Basic Keelboat II and for Basic Cruising and BBC POBs.

Basic Keelboat II

Must be able to return the boat near to the victim consistently, in moderate conditions (within a 1/2 boat length and under 2 knots of speed.) Victim may float to either side of boat.

BC and BBC

Must be able to return the boat (from any point of sail) to the victim safely with the boat stopped to windward of the victim.

1. The boat must be stopped; or slow enough that it takes a count of 10 for the victim to go from the shrouds to the transom.
2. The victim must not contact the boat forward of the shrouds.
3. The victim must be within arm's reach at some point while between the shrouds and the transom.
4. The tiller must be held to leeward during the pick up.

Appropriate number of boat lengths to sail from the victim

In training, it is ok to allow students to sail a fair distance away, in order to have things happen slowly and give the student a chance to think it through. (5-8 boat lengths is acceptable) However please make it clear that 3 boat lengths is the best compromise between maneuvering room and maintaining visual contact with the victim. By the time they reach certification, they should be expected to do an overboard without getting any further away than 3-4 boat lengths in a strong breeze.

Different procedures for different levels and different conditions

This is a challenge for a couple of different reasons. Even among instructors who train the OCSC way, students may complain that they were getting different rules from different instructors. This particular problem is due to the fact that we may not emphasize enough at the BK level and in lighter winds that everything changes at the BC level or in stronger winds. I want you to:

1. EMPHASIZE how the training at BK level is different from that at BC/BBC. Point out that we are focusing on steps and procedures (such as

prompt initial response, tacking to a b/r smoothly and working on finding the zone of approach) in BK, but that there will be a new set of requirements at BC level for them to absorb (downwind overboard, speed, leeway control on final approach, finding the zone of approach from any position relative to the victim).

2. Whenever you are teaching the overboard maneuver in moderate breeze <15 knots, emphasize that the maneuver is very different in 20 knots. Make the point that the boat stops more quickly and makes more leeway, the harder the wind blows. Don't wait until the wind blows hard and they are already struggling to clue them in. Also put that info in your BK II overboard lecture.

Actual differences in teaching styles and preferences by instructors

This has been the most embarrassing to admit to students and the toughest to deal with. The items below are to be THE procedures that we use, without exception. If you find yourself saying to me or another instructor "Well I find that it works best when..." rein yourself in and review this list again.

1. Instructors on two boat classes will review this list with each other before the class starts and ask me to mediate any interpretation differences.
2. Students will always sit to windward during maneuver, until it is time to retrieve the victim.
3. The tiller will always be brought to leeward at the end of the maneuver with the tiller trapped between the skipper (while reaching over the lee side for pick up) and the backstay during the pickup.
4. The mainsheet will always be tended during the tack, so it doesn't foul on the traveler.
5. The OCSC standard at BK is not the same as the one at BC.
6. The BC Standard is that the boat be stopped, sails luffing, upwind of the victim, with the victim not contacting the boat forward of the shrouds. However, THE PUBLICIZED LIMIT OF FLEXIBILITY FOR SPEED IS THAT THE VICTIM MUST TAKE AT LEAST 10 SECONDS TO GO FROM THE SHROUDS TO THE TRANSOM.
7. THAT WOULD BE ENOUGH TIME TO GET A LINE ATTACHED TO THE VICTIM. Please cover this continually with your students during BC training (not BK training) so that it isn't a surprise when they are asked to sail to that level during a PT. Even though we use a rough guide of 10 seconds, please don't count aloud during a PT, it is a much more productive thing to use as a training tool and it freaks out students who are in a practical test. Also, if the victim takes less than ten seconds, but it is clear that the victim could be grabbed and secured to the boat, then you should consider that maneuver successful.
8. Emphasize that the skipper, not the spotter, is responsible for keeping track of the victim. The spotter is there as a back up. Remind them that glancing back to the victim often will also help them keep oriented as to

where they are in relation to the zone of approach. During a PT you may be assigned to be the spotter if the candidate so chooses.

9. Ways to find the zone of approach:

- * Course adjustments (above or below a beam reach course to victim) use the wave trains and even the boat's wake to determine when roughly below the beam reach course.

- * Use the windex, victim and luffing amount of the main when headed toward the victim to determine whether the boat is in the zone of approach.

- * Don't use the "abeam while on a deep broad reach" method of determining zone of approach. Encourage students to turn the boat more sharply if boat is too high for a safe approach. It kills more speed and gets the boat further to leeward more quickly without giving up as much of the distance from the victim needed to adjust the speed of the boat later.

10. At the BC level get students to aim the boat AT LEAST A BOAT WIDTH TO WINDWARD OF THE VICTIM IN ANYTHING OVER 15 KNOTS during the final approach. Remind them that the boat goes sideways at the last moment if they have killed their speed. With the helm to leeward, the boat will almost go straight downwind sideways, if forward momentum is low enough. Constantly remind them that if the victim disappears from view of the skipper while the skipper is on the high side, the boat is probably too close to the victim and should be headed more up wind.

11. Leave the jib trimmed and backed until the boat is on a deep broad reach. This is the best compromise to keep the boat under control, have the tack done quickly (within the three boat lengths) and get her to bear away quickly.

12. No diving to leeward for the victim. Emphasize before any attempts that in a real situation, trying to grab a victim before he or she sails past is impossible. It puts the student at risk and gives them a false sense of progress. Tell the students that the proper way to perform the pick up is to get the boat stopped upwind of the victim, put the helm all the way to leeward, lay down on the leeward seat and wait for the victim to come to them. Explain that if the boat is stopped, helm down, the student has controlled the boat properly but the victim is an arm length away, they mustn't leap toward the bottle to actually retrieve it. Even if the maneuver was otherwise successful, explain that they would be considered to have acted in an un-seamanlike way if they chose to dive to leeward to catch the victim. (Please don't actually mark them down for that in a PT.)

13. Skipper should trim mainsail through tackle assembly during the final approach. Don't teach grabbing the falls of the mainsheet to trim unless you are practicing in VERY light wind and emphasize to students that in any breeze above five knots, the sail can't be properly trimmed without the four to one purchase.

14. Overboard while sailing downwind:

- * Add some lecture time to your BCI sail trim lecture to cover the basic differences and problems with downwind overboard compared to others.

- * Point out continually that using the quick return/fig 8, that the boat gets to a beam reach one to two boat lengths DOWNWIND of where the boat

would be if doing it from close hauled or a reach. That makes the maneuver to get into the zone of approach different. They will barely need to bear away after the tack. (You have probably gathered that I do want them to go to a beam reach as in the upwind/reach maneuver.)

* Have the students' trim the main in half way during the beam reach, but have them get to the beam reach concurrently with the shout, spotter assignment and flotation toss. Then have them trim the sail in anticipation of tacking.

* Have the student look back at the victim before tacking to estimate whether or not the boat is in the zone of approach. Tell the student to tack only when they are sure that they can sail back to the victim on a close reach. Explain that it might be a boat length or two more than usual.

15. Please discuss in your lectures on overboard and out on the water occasionally the actual retrieval process, which must include: Get the victim attached to the boat and get the sails down FIRST! Then discuss the various tools you have to help you pull them aboard.

GYBING

Gybing while Sitting down

If students are sitting down to gybe, they should be seated fully on the bench with the tiller in their aft hand and the mainsheet in their other. They should not squirm to the edge of the seat or kneel in the cockpit well. Some students try to do this to control the tiller under their arm so that both hands are free for the mainsheet. This puts them off balance and too close to the end of the boom. If students want both hands free, then teach them the alternate method of standing up and leaning into the backstay.

Gybing while standing up

Teaching students to stand up and gybe requires several important points to be made.

1. Standing up puts the skipper in an unstable position; therefore you must emphasize that the skipper should move all the way back to the backstay/stern rail and stand up straight against it while trimming/gybing the boat. This also keeps his/her head away from the boom.
2. The tiller must stay up and in the armpit of the skipper, so that it is never free to swing from one side to the other.
3. You can use these phrases to remind them:

"Back to the Backstay or Boom to the Head" or

"Stand Up, Back Up, Sheet, Sheet, Sheet"

MISCELLANEOUS PROCEDURES

Switching Helm Positions While Under Sail in Class

1. If possible, flatten the boat by bearing away, not to a run, but to a beam or broad reach.

2. Have new helmsperson slide feet first outboard of current helmsperson and sit aft of current helmsperson.
 3. New helmsperson holds tiller, gets a feel for the helm and says "I've got it".
 4. Old helmsperson releases helm and moves forward.
- NOTE: In Basic IKeelboat I, or at anytime conditions make this unsafe; instructor takes the helm, eases the main to flatten the boat out and steers while students switch positions.

Position of crew while tacking the jib

Do not teach jib trimmers on the J24 to kneel in the cockpit well, but rather: Sit beside the weather winch, with the tail of the loaded sheet in one hand and the tail of the lazy sheet in the other. During the tack, squat under the boom and switch sides, placing feet under the new loaded winch. Once tack is complete, move to new-loaded winch for extra wrap, and use handle for fine tune, and cleating. Be sure to teach students to "brush" the tail through the cam cleat for easy cleating. Only teach students to kneel if:

1. They are unable to clear the boom without it,
2. They are fearful of falling out of the boat and need the security

Lifting/ Lowering motors while steering.

Some members had mentioned we were forcing them to steer the boat and lift/lower the engine. Have the student steer while another raises/lowers. If a helmsperson is bigger and stronger than average AND insists on doing both, let him or her try.

Reefing Procedures While Underway

1. Orient the boat so that by easing the mainsheet your main luffs well before the boom reaches the shrouds. To do this, you will need to heave to or sail on a close reach under jib alone. (Be sure that you steer away from any obstructions and have someone maintain a lookout for other boats.)
2. Release the Boom Vang.
3. Determine which reef you will put in: First or Second.
4. Lower main halyard until the reefing cringle can be slipped over the Reefing Hook on the Gooseneck. (Do not confuse the reefing tack cringle with the Cunningham cringle)
5. Re-tension the halyard until a slight vertical crease in the luff of the sail indicates sufficient tension.
6. Pull in on the proper reefing line until the clew reefing cringle is down to the boom and a horizontal crease in the new foot of the sail along the boom indicates sufficient tension.

7. Cleat the reefing line firmly, and, if on a J24, tie a slip knot in the tail just outside the cleat, to stop the line if the cleat slips.
8. Tidy up the reef line and halyard.
9. Trim the main so the end of the boom is inside the lifelines. Wrap up loose and unused sail tightly at the clew and tie it to the boom with a sail tie, through the reef clew (earring)
10. Re-tension the Boom Vang.
11. Resume your desired course, and re-trim the main for the point of sail.
12. If necessary for visibility if you are unable to put in the clew earring, LOOSELY tie the sail around the boom with the sail ties through intermediate reef grommets.

Poor Weather Classes

What do you do if the conditions won't allow you to complete the syllabus? In general, here are the basics. However, read below for lots of information on how best to serve our students and keep OCSC efficient and profitable.

1. Base your decision on your students' abilities, what they need to work on and the nature of the class and find productive uses of the time. (i.e. if they need to work on motoring the class can go on in some form. We rarely cancel an entire class, but when, for example a BCC level student needs only sail person overboard work , and there is no wind, we have no real choice but to cancel and give them full credit for the session.)
2. Never cancel a class before checking with the club manager for the day, but you can expect cooperation from him/her once the facts are discussed & options discussed.
3. When shortening or canceling a class, mention to the office what sailing time the client needs compensation for.
4. If you are continuing a class that will need some compensatory time given to your students, don't make a final determination until the end of the class; However, reassure the students that we plan to compensate them, and we'll determine how once the class is complete.

Creative responses to Mother Nature when she is not at her best

We all have experienced the difficulties associated with making a sail training session fun and functional when the weather doesn't cooperate. Students' moods often droop, frustration can set in and money flows out of OCSC like water! In addition, attempting to guess what the students, the

head of training or the owners' want done in these cases can be a challenge as well....

My intention with this paper is to give you some structure to follow when confronted with these situations to make your life a little easier and to strengthen your ability to provide a quality experience to your students.

There are basically two different types of weather that create the need for departure from the syllabus, weather that is too strong for safety or comfort and flat calm.

DEALING WITH HEAVY WEATHER

1. I would like to present to you our intentions at OCSC as relates to heavy weather related problems. These are listed in order of priority and importance...SAFETY, COMFORT, FUN, LEARNING
2. Safety is first and utmost. Sailing has risk at almost every level and we can't completely eliminate risk from the equation. However, we have an extremely good safety record while training students and it is due in part to the culture of safety we have developed.
3. Comfort and Confidence of the students is second. Even if students are safe, if they feel unsafe, then we have failed to do our job. You must always have explicit permission from your students to continue on the water in marginal conditions.
4. Fun & Enjoyment. Students only learn when they are enjoying themselves. They are at OCSC to enjoy themselves and learn how to sail. Your job is less to teach them than it is to facilitate & guide their education and keep their spirits high while they practice and experiment. Make sure that the conditions are challenging and exciting rather than intimidating.
5. Skills and Knowledge Progress. Move the students closer to their objectives as creatively as possible, within the structure of our program.

Notice that the lowest item on the totem pole is the teaching part. Try to keep this fact in sight as you decide on how to manage conditions that are a little TOO realistic....

Under no circumstance should you be sailing with students in completely unsafe conditions. You are the arbiter of whether conditions are safe while on the water, but you should make your judgment based on several factors. Because you work here at OCSC, I know you understand why each of these factors is important. However, it is helpful to be reminded of how complicated making safety decisions while training can be. Below are the important factors to consider while managing the safety and comfort of your students:

1. Course Level
2. Age, strength and ability of the students
3. Student Attitudes and Confidence

4. Your skill level
5. Wind Strength
6. Precipitation and Visibility
7. Air Temperature
8. Type of Training
9. Type of Boat

STUDENT COMFORT AND CONFIDENCE

Your students will let you know how they feel about the weather and the course if given an opportunity. They also will give you the benefit of the doubt more often if they understand that you will take care of them comfort wise and OCSC will ensure that their training is completed in make up time if necessary.

ASK THEM HOW THEY FEEL AND WHAT THEY WANT TO EXPERIENCE. TELL THEM YOU WILL ONLY TAKE THEM OUT SAILING IF THEY WANT TO AND THAT IF THEY DON'T GO, OCSC WILL RESCHEDULE WHAT SAILING THEY MIGHT NEED TO COVER ALL THE NEEDED TOPICS PROPERLY.

GUNG HO STUDENTS

Gung Ho students are everyone's favorite. They are adventurous, usually quick learners and enthusiastic by nature. It is important to consider their enthusiasm as you think about student comfort. Some students are so excited about sailing they enjoy themselves even when physically uncomfortable. You are in the best position to gauge this if you have developed a level of rapport with them.

Quite often you will have adventurous students with timid students on the same boat. There are a number of options, but only you will be able to determine which is best. The most important rule is to realize the discrepancy in student personalities and apply some common sense to the situation.

* If the differences are minor, ask the timid one(s) for permission to take the experience an incremental bit outside their initial comfort zone while giving them instant veto power, if they start to feel uncomfortable. (a good rule for all teachers at all times dealing with timid students is to ask for and receive permission from them to move ahead slowly, with reassurance to them that they can stop at any time. Even the most timid students will surprise themselves with what they can do, armed with decision making control over the process) Take the process of increasing their comfort level with challenging or intimidating conditions as far as you can while keeping the Go/No Go switch in their hands.

* If the differences are major, you will need to determine whether the course should be toned down or livened up. Obviously, if you liven it up, the timid student will need to be separated from the adventurous one. Common situations and steps to take:

* How close to the edge of safety the conditions are-if very close, tone things down some to see if you can get the timid student on board.

* Is there another module being conducted where there are more middle of the road or timid students and which could provide you the opportunity to switch students between boats?

* If a student is VERY timid and, in your professional judgment, the conditions are challenging but fairly normal for that level of training, then consider a conference with a club manager to see if the person should be eased out of the course that day. Of course, that has to be handled extremely diplomatically, but Club Managers have been trained to deal with those situations and quite often, the timid person is insulated from the normal course cancellation or interruption fees that might accrue. If the decision is to leave the student ashore while the course goes sailing, privately and diplomatically approach the student and suggest postponing their participation for when the conditions are better. Get them into a conference with the Club Manager about their options and return to your course.

DEALING WITH TOO LITTLE WIND

The priorities stated above still apply, although you could probably substitute "student enthusiasm" for student comfort and confidence. The big challenge on calm days is keeping enthusiasm high. (Remember that, in addition to students being more fun and having more fun when they are enthusiastic, they learn more quickly as well.)

On balance, students are usually happier on the water than they are in class. So, your central thought while you consider options for departure from the syllabus should be "Try to find a productive way to spend time on the boat."

Also, students are happiest working on things (even out of proper sequence) that they had planned to work on that weekend or the next.

FOLLOW THIS SET OF STEPS TO CHOOSE THE BEST TRAINING FOR YOUR SITUATION.

1. BEFORE DECIDING ANYTHING, EVALUATE YOUR SYLLABUS CAREFULLY AND CHOOSE SOMETHING, IF YOU CAN, THAT IS AHEAD IN THIS COURSE. e.g. Morning of Day 1 BCI, there's no wind, introduce the motoring or cover the sail shaping lecture, rather than the BK skills review.

2. IF YOU ARE LATE IN THE COURSE, CONSIDER THE SKILLS IN THE NEXT HALF OF THE COURSE. e.g. If the afternoon of Day 2 in BC 1 is dead from a breeze standpoint and all three students are together the next weekend for BCII, consider the Anchoring session outside the marina, or Genoa use, or refining their close quarters under power skills.

3. IF YOU ARE LATE IN THE FIRST HALF OF A COURSE BUT THE STUDENTS DON'T SAIL TOGETHER IN THE NEXT SEGMENT, CHOOSE SKILLS WHICH UNIVERSALLY NEED

WORK.eg Marina Procedures-this is tremendously useful and is often under practiced; reefing or reefing refinements.

4. ENSURE THAT IF YOU WILL SPEND EXTRA TIME IN THE CLASS ROOM, THAT YOU ARE POSITIONED TO SEE ALL CHANGES FOR THE BETTER IN THE WEATHER OR APPOINT A STAFF MEMBER SPECIFICALLY TO WATCH OUT AND GIVE YOU THE HIGH SIGN IF THE BREEZE COMES UP.

Below are listed each of the core courses here at OCSC with what are normally the optimal topic choices for syllabus departure. When using these, BE ABSOLUTELY CLEAR TO YOUR STUDENTS THAT YOU ARE MODIFYING THE SYLLABUS DUE TO THE LACK OF WIND. EXPLAIN THAT THESE TOPICS MIGHT BE COVERED IN DIFFERENT ORDER OR TO DIFFERENT EXTENTS IF THERE WERE BETTER SAILING CONDITIONS, BUT ASSURE THEM THAT THIS APPROACH HAS PROVEN TO KEEP THE COURSE ON TRACK THE VAST MAJORITY OF TIMES. ALSO, ASSURE THEM THAT IF THE CONDITIONS CONTINUE TO DISAPPOINT, THAT OCSC IS COMMITTED TO PROVIDING THEM ALL THE TRAINING THEY NEED.

BASIC KEELBOAT I

1. Knot Tying-This is something that has no pre-requisite and can be done at any time during BKI. If the conditions are forecast to be marginal, even consider keeping the Knot Tying section in your back pocket while the wind is there and only cover it late in the course or once you have covered all the sailing portions.....
2. On board Terminology review- quiz and drill students on parts and directional terms. Any time after initial set up is a good time for this.
3. At the dock pantomime of coming about- hoist the sails-you become the "wind" and move the boom/jib clew accordingly-work on communication, tiller movement, switching sides.
4. Subsequent Lectures-even if you have to give the "gybing" lecture again later, you will save time and your students will have learned the topic better. Point out to the students that you understand that some of this info will be hard to grasp completely without time on the water, but that hearing it starts the comprehension process. Assure them that you will review it just before they have to perform the maneuver and after.
5. Operating the outboard motor- especially if the students are sailing together at the BKII level, this is a no-brainer. It gets the students futzing with the boat, having fun and accomplishes a syllabus objective. If not all the students are sailing together the next level; or everyone is an accomplished power boater, use this sparingly, but feel free to have some basic intro to the engine. If they hear that more than once it will be OK.

NOTE: EXCEPT IN DAY ONE OF BKI, IF YOU ARE TEACHING IN THE "LIGHT AIR" SEASON. IF THERE IS WIND AT ANY GIVEN POINT IN YOUR TRAINING, YOU SHOULD DO EVERYTHING IN YOUR POWER TO COVER A SAILING PART OF THE SYLLABUS. YOU

MUST USE YOUR OWN JUDGEMENT, BUT BREEZE IN THE WINTER IS SUCH A VALUABLE COMMODITY, YOU WILL ALWAYS DO BETTER FOR YOUR STUDENTS BY SAILING THAN CONNECTING THE ACADEMIC DOTS IN YOUR SYLLABUS.

BASIC KEELBOAT II

1. Person overboard lecture-students have the most trouble with this maneuver. Get them started early with the steps and theory.
2. Visualize and repeat aloud the steps in an overboard drill. If the students have yet to try to perform the maneuver.
3. Introduce the motor and motoring skills-docking and slip departure. As is true of knot tying, this could be postponed until the rest of the syllabus was covered if you have breeze early in the course.
4. Repeat Marina procedures and drill students on them. Consider playacting environmental factors, such as "here comes the Hornblower, now what do we do?"
5. Tuck and un-tuck reefs

BASIC CRUISING I

1. Downwind Person Overboard Lecture- This is a great way to start BCI off if there's no wind. It bridges Keelboat and Cruising just as the review sail is supposed to do.
2. Motoring skills backing up, port and starboard hand dockings, even backing into a slip is a great skill developer to force them to be precise when the lack of wind would otherwise let them off the hook.
3. Sail shaping lecture can easily be done out of sequence. Normally, there isn't time to drill students on proper sequence of sail trim adjustments for rising breeze, but this would be a good opportunity to do some informal oral drills on sail shaping and de-powering.
4. If all three students are back for BCII, then the Navigation lectures from BCII day one AM works great, especially if you are in the later stages of Day 2 of BCI.
5. Drilling on emergencies in the marina-Create a scenario where the boat is in mid-sail hoist, shut the engine off, claim the wind is 20KTS from the West and ask the skipper to respond to keep the boat and crew safe. Then debrief with crew afterward about the skipper's decisions.
6. Line throwing is a skill that the students really need and is practiced insufficiently. Throwing the line off the boat while out on the Bay is good. If there are two boats, lining them up near each other and throwing between them is even better.

BASIC CRUISING II

1. If you are teaching this in the "light air" season, and, you have good breeze early on Day One and good breeze forecast all day, switch your

entire days and cover Day 2 on Day 1. You can do the navigation lecture, navigating practice and anchoring on day 2 whether or not there is breeze.

2. If there is little or no wind early on Day 1, consider having the students rig the Genoa for the trip to TI. First, if there is any breeze, the boat will perform better. Second, if you get enough breezes in the PM to work on SPOB on the way home, you can do a headsail change underway.

3. Also, if the wind comes up late on Day 1, be sure to cover Heaving To, in case the breeze doesn't cooperate on Day 2. Cover it sufficiently to allow students to practice it in reviews. If you have breeze on Day 2, review it again to give the students a more thorough presentation.

4. On Day One, you are at TI and there still is no wind-having ensured before you left OCSC that you were fully fueled, take the boat to where you think the breeze has the best chance of filling in, while getting the boat to places previously unexplored by the students which are navigationally challenging-High Current, Shipping, Golden Gate, Angel Island, etc.

5. Day 1 was no wind-you covered the syllabus-nav, anchoring, but little else-Now on Day 2 there still is no breeze. Cover Heaving to at the dock, pantomiming the process and drilling each student on procedure. See if you can get a glimmer of understanding of the forces at work and, if so, consider quizzing them on the dynamics of why it works, what it is good for and things to watch out for (oscillation of the bow, traffic, leeway while forereaching, etc..)

6. Take the boat out of the slipway and show them how to scull and rock the boat to gain headway.

7. Out in the Bay, have them motor the boat at hull speed, put the engine in neutral and work on slowing the boat down with sharp turns. Discuss when these sharp turns are good (killing excess speed in an overboard recovery approach or docking approach) and when they are bad (while tacking).

8. Consider spending some time with them motoring forward, using the engine to stop, and determining the precise moment in which headway is lost and sternway is gained. Use on shore ranges, bubbles and flotsam in the water, nearby buoys, etc.

OTHER COURSES AT OCSC

There are many courses at OCSC that might require departures from the syllabus based on weather challenges. Although outside the scope of this paper, they have similar challenges and the responses are similar in spirit and intent to those I have list above. Be sure to enlist the help of fellow instructors, the Club Managers or the owners if you are uncertain of the best path toward accomplishing the students' and OCSC's goals. And we know what was not accomplished.

Double handed sail hoisting at BC and BBC levels.

Students are still getting hung up on being asked to operate the boat with one crew, after being trained with two. Have students at BC and BBC courses and reviews hoist and lower sails double handed.

In BBC, have team A hoist and team B lower in am, then switch in afternoon. In Reviews, rotate as per BC below.

1. Skipper --helmsperson and halyard tailer
2. Crew --main feeder and jib hoister
3. Observer/critic--observes Procedures of skipper and crew

Night Sailing Classes

Saturday nights from 7 PM to 11PM Summer - 6PM to 10PM other seasons
The class is an orientation to night sailing, with six students, one instructor

Important to cover:

1. Risks: man overboard, deadheads, unlit buoys, poor visibility and distance judgment, cold and hypothermia, collisions with unlit or improperly lit vessels,
2. Procedures: Protecting night vision: steering by compass and chart reading, some well-used compass readings, practice gybe method and quick stop pobs with something we can afford to lose, have them realize how difficult it is to pick up in the dark, practice on identification of shipping lights and navigation aids: i.e. range of lights and direction of the ships. We now have WATER FILLED CLEANING BOTTLES that we can afford to lose. They are stored on board or failing that, in the dock locker where the outboard engines are flushed on the small boat dock.

MARINA PROCEDURES

Be sure to study the procedures guides in the Syllabuses to be sure that you teach the same procedures that other instructors do. In addition, there are procedures and challenges described below that you should be aware of.

Teaching Reefing At the Dock

For years we've taught our students, when in doubt, to tuck a reef in at the dock, before they leave. This has created a couple of challenges that I'd like to address.

First, they are encouraged to raise the sail at the dock to reef it. Of course if they had a good reason to reef in the first place, it's blowing pretty good and the sail is taking a terrible beating. Now, it is possible to tuck that reef in at the dock, but it does increase the chance that it is done improperly and at any rate, raising a sail with the clew reef line tight and the reef tack a few inches aft of the mast track makes the sail difficult to raise and puts unnecessary wear and strain on the luff of the sail.

Teach all students reefing at the dock, hoisting the sail for clarification, but then show them that the reefing procedure is normally done while hoisting the sail out in the channel. Also, please teach them that hoisting the sail for "inspection" in more than 10 knots of wind is not appropriate.

OCSC Procedures for Slip Departure

In the interest of consistency, below is a standard of procedures to be followed when teaching slip departure. This assumes a westerly breeze so procedures will be slightly different for different wind directions, but try to follow the general intent.

Preparing to depart

1. The skipper sets a game plan based on the wind direction and strength, current and the experience of the crew.
2. The skipper explains that plan to the crew and explains the crew's role. This will vary, depending on the variables mentioned in item 1 above, but will generally involve the crew tending the bowline and keeping the boat under control while it is alongside the finger dock.
3. The skipper checks all adjacent slips and the exit channel for any traffic that might create a hazard for the boat as it leaves the slip.

Slip departure

Two general rules to follow are "Cast off spring lines first, breast lines second" and "Cast off leeward lines before windward lines".

1. Cast off the spring line
2. Skipper eases the stern line only until the bowline is taking the strain. (The boat will drift to leeward three feet or so)
3. Bow person casts off the bowline and steps quickly to the shrouds, stabilizing the angle of the boat, parallel to the finger pier.
4. Skipper places engine in reverse and backs straight, until the bow clears the slip and other boat's transoms. (Note: Engine should be kept in reverse only long enough for bow to clear slip.)
5. Skipper puts engine into forward, uses it to stop reverse momentum and to turn the bow down the slipway.

Returning to the Marina

Don't allow students to center the main while motoring down the Marina Fairway. Always force them to motor sail, with the sail trimmed/handled as if the engine were off. (If there is no wind, of course, you may center it, but make that point to them very strongly) Remind them that they are a motorboat, according to the Rules of the Road. Also, have them sail in on Starboard Tack to avoid the Berkeley Yacht Club windshift and to maintain right of way over more sailboats in the marina.

Removing and Reattaching Fenders and Docklines in the Marina

In order to reduce the time a crew member would need to be on the foredeck while the main is up in the marina, please teach your students to remove fenders and dock lines before hoisting the main while departing and have them reattached after mainsail is down while returning.

Running Stern Springs for Diesel Auxiliaries

All OCSC diesel auxiliary powered boats must employ a running stern spring to leave our slips at Y and Z dock. There are specific procedures to follow to ensure that the line not get caught on the dock or in the propeller, so please review them in the BBC instructor syllabus and the BBC student manual. If there is a southerly wind, the spring line must be augmented by an OCSC staff person tending the bow and shoving it through the wind. Do not allow students or members to leave the docks in a southerly of any appreciable strength without that additional assistance.

Docking Under Sail

Is only taught in Seamanship Under Sail and Performance One and Two. Otherwise teach touch and go landings at the fuel dock.

BACK AND FILLS

In this maneuver, we are somewhat restricted in our training by the inescapable fact that collisions are expensive. Therefore, we can only create a certain level of difficulty in this maneuver. Below are those procedures and restriction in place here at OCSC.

Back and Fills in large boats

In winds of fifteen knots and up, only practice back and fills between the fuel dock and 'Y' dock.

In less than 34' boats and less than 15 knots of wind, you can practice Back & Fills between Y and Z docks.

Before having a student or charter candidate perform a B&F, remind them that you may, at any time, ask them to step away from the helm so you can recover from a close call. This means that you must be near the helm at all times.

DO NOT use the, Sabre 34, or Sabre 32 for B&F; they are just too un-maneuverable to be safe (and cost efficient for training)

During docking or back and fill practice, the instructor should always be near the helm; not in the companionway or the shrouds; When it is necessary to perform bow person duty, move to your position at the shrouds only when the docking is sure to be successful. Point this out to your students so they don't worry why you are waiting so long.

Back and fill procedures for first service students and PT candidates

- i. Before you leave the dock, explain the whole procedure, what will be expected of the candidate and what will not.
- ii. Depart the slip yourself, explaining and demonstrating.
- iii. You may demonstrate the back and fill in the area between the fuel dock and "Y" Dock, however, take the client to the windward breakwater for some warm up, orientation and practice. This should include basic shifting of the transmission, stopping and turning maneuvers, followed by the back and fill. If clients are given an opportunity to warm up to the boat and the procedure, having them perform between "Y" dock and the fuel dock should be no problem.
- iv. Do not have students do back and fills in the area between "Y" and "Z" docks.
- v. A back and fill maneuver consists of one 180 degree. turn, using windage, prop action and gear shifting. clients should not be asked to turn 360 degree. or do the maneuver in a tighter space than described above.

COMMON CONCERNS OF STUDENTS

Apparent Inconsistencies in Instruction

This problem is, to some degree one of perception. Students are not sure where differences in procedure or style between instructors are helpful and where they are harmful. It is our responsibility not only to offer consistent training in areas where it is called for, but also reassure students about topics and procedures that can be handled with different techniques or styles. We must also point out, where appropriate, the topics that must be learned in more than one fashion.

Below are some great techniques:

1. In Basic I, start by describing the OCSC training process and explain the things like: importance of mixing the different perspectives of instructors throughout the training program.
2. When describing how to do something which can be done different ways, be sure make that point to your students. Then, they know what requires a single strict procedure (i.e. throwing a PFD in an SMOB) and what can be done many ways (i.e. sitting while gybing vs. standing.)
3. When questioned by a student as to a difference in procedure,
DON'T;
 - a. Get defensive
 - b. Use words such as -Some instructors like to do it that way BUT I think it should be done this way."
 - c. Say -If he really said that, he's wrong.DO;
 1. Say -"Actually, both work. People usually gravitate toward one,or the other, based on what is the most comfortable."
 2. Or, Say-"Yes, in certain conditions or levels of training, that is exactly what is taught. However, in (these winds-BC level-on this boat) we must modify that approach in this way."

3. Only suggest a pet procedure of yours when you've made several attempts to help the student work on the procedure they were originally taught.

For Example:

A Student stands up to gybe and loses his balance while gybing (You may prefer the sit down method of gybing.) Before you even introduce your method, you should work with the student on standing up to gybe several times. If the student doesn't improve, try saying -"We instructors have an alternative way of doing this for people who have difficulty with this procedure. Would you like to try it?" By presenting it this way, you give the student the option and you also reinforce the idea that both approaches are reasonable in certain situations.

Safety Concerns

A few remarks we've received in the past from students indicated concern on their part about our emphasis on safety. Since I know we spend a tremendous amount of time on safety issues, I was intrigued by the remarks, and, after discussions with both students and instructors, something interesting was revealed. Students hadn't recognized safety training as such because the instructors hadn't labeled it "safety information."

Proper boarding technique, keeping out of the way of the boom, proper winch uses are all safety procedures. However, it's common to emphasize other reasons for these procedures in addition to or instead of safety reasons. This can create anxiety for students focused on being as "safe" as possible and expecting something specifically aimed at safety.

Keep in mind that sailors who take lessons have already identified themselves as concerned with safety. They are taking lessons because they want to be safe, so make sure they know you are training them to be safe. Don't be afraid to use the words "for your safety" or "Here's a safety tip!" in class. Your students will appreciate it!

Unhappy Client

When you are faced with an unhappy client, the most important thing is to keep calm, be polite, and as helpful as possible. Try to validate the person's anger by empathizing and reassuring them that you are committed to find a solution to their problem. If you can resolve the problem yourself, by listening, trying to see their side of the issue and being willing to make changes in your presentation, approach, or judgment if warranted, then wait until the end of the day to let the Club Manager for the day know what happened.

If you are unable to satisfy the student, reassure the student that you want to find a solution they'll be satisfied with, immediately find the Club Manager for the day, introduce the student to the manager and mention only that the student is unhappy with you (or the boat, or the program)

and allow the student to explain themselves. Don't interrupt or defend yourself. You'll have an opportunity to explain things later and have a frank discussion with the manager, after the client has left. What we need to do initially is defuse the situation, and calm the client down. The manager may ask you for some information. You should give direct, polite answers while maintaining the utmost concern for the student's feelings and perceptions.

Often, you can have a private conversation with a manager before they meet with the client. Again, take the manager into a back office or out of earshot of clients to discuss. If managers look busy, use the phrase, "Got a Minute?" That will usually get them to break away. If not, put a note in front of them mentioning a customer emergency and they will respond immediately. Try not to interrupt a club manager obviously involved in a sales presentation.

Important: Pull the manager aside to explain the situation and insulate the parties involved from the rest of our business and clientele by pulling them aside for some privacy.

STUDENT ADVANCEMENT AND TESTING PROCEDURES

Because most of our students have serious, long-term goals as sailors, they are most interested in the progress they are making toward those goals. This makes the procedures for advancement and testing critical to the success of the whole school.

Training Cards

The training cards are the records and history of a student's progress as a sailor. They also serve as the communication link between different instructors, so that the training for the student is more directed and efficient.

Therefore, they must always be filled out properly and thoroughly, with any information that might help the next instructor serve the student well. Before filling out a card, it is useful to ask yourself two questions: 1. What would I want to know about this student if I were the next instructor? and 2. If this student reads this card, will he/she understand and agree with my perceptions and conclusions?

Grading System on the Cards

Follow these guidelines for grading students on their cards. Include numbers on the weekend long course cards as well as on the review cards.

GRADE	COMPETENCY
1	No comprehension
2	Some comprehension/Poor execution

- 3 Good comprehension/Mediocre execution
- 4 Good comprehension & execution. Can move up if overall pretty strong.
- 5 Definitely ready to move to next level in this area

If they have mainly 4's and 5's, recommend for next level. (Remember a 5 at BK level is not a 5 at BC level; also: A '3' on " on boat set up is not as important as a '3' on "person overboard.")

For a card to be completed, not only must there be scores on the front of the card, but some info on the back of the card about that student's particular abilities, desires, problems, etc., as well as any weather, boat or personality related problems of which the next instructor needs to be aware.

Training card completion & filing system

All of your class cards will be pulled for you before your class and refilled for you afterward this includes weekdays as well as weekends. Your job will be to complete the cards and put them in the Completed Class Cards box.

1. You are paid 15 minutes at the end of the day to complete all cards and paperwork for which you are responsible. DON'T TAKE THEM HOME!!!! Or put them in your seabag.
2. For multiple class days (2 BRs or PTs), you can complete some of your cards or P/W at lunch, fill out the balance at the end of the day, and take your 15 minutes, even if you only use 5 or 10 at day's end.
3. For multiple classes without breaks in between, you'll need to make short notations between classes as reminders; then complete the cards or paperwork at the end of the day.
4. If we discover cards not filled out properly, we will dock your hours for that day by 15 minutes. After 3 different times, we will dock your card 30 minutes for subsequent omissions.

OCSC Certification guarantee BK, BC, BBC

OCSC offers a guarantee of certification to students if they fall into certain categories. These cert. guarantee packages are offered at the Keelboat, Basic Cruising and Bareboat Cruising levels.

PROCEDURES AND LIMITATIONS

1. Students must select the full two-weekend (or week long) package up front and complete the certification in 90 days from the date of the first class. They must also be certified at one level before they qualify for the guarantee at the next.
2. Students may take reviews and PTs for free subject to the evaluation of the instructor. You are responsible for determining whether a review or a PT is the next appropriate step for a student. The student receives any

training you recommend at no charge. If you recommend a PT and the student wants an additional review the student would be charged for that review.

3. So, it is important that your debrief include consensus with the student as to their next appropriate step. If there is a disagreement that you can't resolve, bring the issue to the club manager's attention and we will discuss/negotiate with the student.

4. During the Guarantee period, Private Lessons are half price and sometimes a good option for students.

5. Please make a practical and common sense evaluation of a student's ability and give them specific instructions on their next session. Should it be a review? A PT? Or, both in one day? Before saying goodbye, make sure they understand.

6. After your debriefing, your students should know:

a. Whether they are certified on the water.

b. There is a written exam to complete the certification.

c. If they aren't Cert., what EXACTLY they need to do to complete it.

d. For a precise description of the skills your students should have for each level, review the standards in the Certify sheets.

NOTE: The written exams should be taken after the practical exam has been successfully completed.

Practical Tests

Practical test are the most difficult job you have at OCSC. You are being asked to evaluate the ability of a sailor to keep themselves, their crew and their boat safe on San Francisco Bay based on a 3 hour sailing test. In addition, you must explain to them whether they are ready, describe their strengths and weaknesses and persuade them to agree and accept your judgment, whether or not they pass.

Here are some basic guidelines:

1. Always send the first part of the test explaining to the candidate what is going to transpire and be sure to find out from the student what he or she is expecting, and what his or her sailing experience is.

2. Always offer to demonstrate a maneuver before requiring a candidate to perform it, regardless of whether they are students or not.

3. Always allow a student to repeat any maneuver not done well. They must subsequently do a few in a row to pass, but they should never fail a maneuver they only attempted once.

4. After each maneuver tell the student whether they met the standard for that maneuver. Let the student know in general how they are doing throughout the test, so that if there is any confusion about what is required, you still have time left in the test to give them another chance.

5. Never let the boat or people be put at risk in an effort to evaluate the candidate. If you feel your concern for safety didn't allow you to fairly evaluate the candidate, then we will retest the candidate for free or refund his or her money. It is cheaper than a damaged boat or client.

6. Make it clear beforehand to all candidates that you will have them do several attempts at person overboard and they may be from different points of sail.
7. When it is clear to the student and you that he/she will need to retest, ask if they would rather continue with the P.T. to see if everything else is in order, or work on the weakness in question with the time left.
8. Please give the following briefing every time you sail with someone new, in a P.T. or lesson.: "If at some point I determine I should take the helm to keep the boat or crew safe, I will ask you to step away from the helm. Please do so without question. Is that acceptable?" You should then use that technique to prevent any damage or injury from occurring while you are on board.

If you feel you need to take the helm from a student or candidate, when you aren't sure whether they were about to do some damage, and if that compromises the validity of the test in any way, be assured that I will compensate the client fully and thank you profusely for preventing damage.

Addendum by Phil Shull

In order to transfer the (apparent) onus of passing or failing from the instructor to the student it is vital to properly "set the stage" at the very start of the PT process.

This means that the instructor needs to clearly define the necessary skills that must be met before the student can be certified. More importantly it is absolutely imperative that there be a clear and complete agreement between the instructor and the student, both as to what must happen and what cannot happen if the student is to successfully pass the PT.

This should be followed by a clear explanation of the order of events that will occur during the course of the PT. In other words a "game plan" for the evaluation. At this time it is also important that the student be told that they will continually be kept informed of their progress during the course of the PT.

A suggested approach to the first few minutes of a PT would be to cover the following subjects.

An explanation of the various things that must be done successfully in order to pass.

1. Three out of four Overboard Recoveries correctly performed.
Carefully define (and make sure the students understand) what a proper Overboard Recovery consists of and what problems must be avoided if it is to be considered successful.
2. Must be able to properly reef the boat in a reasonable length of time.
"If you can't reef, You can't certify!"
3. Must be able to properly tack and gybe the boat.
4. Must be able to sail on all points of sail using proper sail trim.

5. Must be able to properly heave to.
 6. Must be able to competently motor the boat.
 7. Must be able to properly tie the required knots. (this can be re-checked w/o another PT, later ashore by someone else, if their knots are their only weakness)
 8. Must demonstrate safe marina procedures and traffic management
- An explanation of things that must not be allowed to happen if the student is to pass.

Be sure to emphasize that if, for any reason, it should become necessary for you to step in and take control of the boat that you will do so before allowing any incident to become critical. They must understand that if you have to take over control of the boat you will do so before the proscribed action has actually happened. However by your action of taking command the mistake has, in effect, occurred and the PT is finished.

1. Must not have any accidental gybes.
2. Must not allow the boat to hit anything.
3. Must not place the crew, boat or themselves in danger.

Outline the sequence of events for the PT.

1. Tie knots and heave line.
2. Have students alternate telling you what topics they would choose to discuss in a new crew briefing.
3. Assign one student to act as skipper and have them brief their "inexperienced" crew on how to depart the slip.
4. Depart the slip and set sail following proper marina procedures.
5. Once clear of the marina sail all the necessary maneuvers.
6. Have the two students swap positions, the first skipper becomes crew and crew takes over as the new skipper.
7. New skipper sails all the necessary maneuvers.
8. Return to the marina dousing the sails while following the proper marina procedures.
9. Have the skipper brief their "inexperienced" crew on how to return to the slip.
10. Dock the boat.
11. Depart the dock
12. Swap skipper position.
13. Have the skipper back the boat down the slipway.
14. Have the new skipper back the boat down the slipway and then dock the boat.
15. During the course of the PT it is critical that the instructor keep the student fully informed as to how they are performing relative to the standard. Do not be tempted to withhold the "bad news" until the end of the PT. You would certainly tell them if they were doing well, so be equally ready to let them know when they're not performing up to the necessary standard. It will pay big dividends if you provide continuous

feedback throughout the course of the PT. Remember, at the end of the PT there should be No Surprises!!

16. You will find that if you have thoroughly briefed the student at the start it will often not be necessary for you to say anything when they have a problem performing some portion of the PT. Indeed, they will usually turn to you and say, "I didn't make it, did I?" At that time all you will need to do is agree and explain why they came up short and how to correct it for next time.

By working with the general principles outlined here I'm sure you'll find that when it becomes necessary to fail a student they will be more amenable with the outcome and have a clearer understanding of the reasons, no matter how disappointed they might be.

Final Words

Here at OCSC, our value to the public is that we introduce people to sailing in a safe, fun and educational environment. We have the conditions in SF Bay, the best school fleet of boats you can find in the US, solid curriculum tested over two decades and the best of the best sailing instructors in the country. Our motto: "Sail with Confidence" tells you why we are here. We are in the business of building confident sailors who, in turn, are great ambassadors for the sport. You are the keystone of this effort, the person at OCSC having the greatest impact on our students. For OCSC to continue and grow, you must keep close to your heart how important it is that students are inspired to fully develop their skills and stay with the sport.

Besides "Sail With Confidence", remember these three words, in this order.

Safety

Fun

Learning

For students to learn enough that they can skipper boats safely, have relatively low stress sailing days, be good, confident hosts to their guests on the water and to represent OCSC well in the sailing community, the process is quite long. For students to dedicate months of their lives to complete 80 hours of training needed to qualify as a BC Skipper, they must enjoy each trip to OCSC and leave more excited about sailing than when they arrived. Thousands have felt safe, had fun and learned to enjoy a wonderful new world because OCSC instructors followed these basic rules.

For your students to gain the most from your efforts and wisdom, you must be supported, in turn, by OCSC. My job is to create and maintain an environment where you can learn and grow yourselves, develop relationships, have fun and connect more closely with Sailing. You can look forward to advanced training on sailing and teaching, individual

coaching on skills, curricular support, sailing rewards and lots of fun during your tenure here at OCSC. Take full advantage!

Welcome, Good Luck and Fair Winds.

Richard Jepsen

CEO, OCSC