

## Evaluation Instructions for Instructors/Evaluees

These basic single-handing evaluations will be assessed by step leaders, on Monday, day 1 of training. We hope that they are an appropriate way of assessing instructors' sailing skills coming into the summer, what skills we will focus on during the rest of training week, and what skills we will look to improve upon during the summer.

As an instructor, you will take one of your step leaders out for ~45 minutes while they evaluate your basic sailing skills. You will be the skipper and are expected to sail the boat *single-handed*, with no help from the evaluator. *Talk your evaluator through everything you are doing on the boat*--if you are looking around for traffic and thinking "I shouldn't gybe here because of the ferry to port, even though I am supposed to be gybing downwind", tell the evaluator this; if you are thinking about tacking around the upwind mark after two more boatlengths of port tack, tell them. You don't have to treat the evaluator as if they don't know how to sail, but the more you are talking the better. The skills are bullet-pointed below and the full checklist will be given to you beforehand.

- At the Dock
  - Rigging
  - Derigging
  - Securing a boat
- Leaving and Returning
  - Leaving the dock
  - Returning to the dock
- On the Water
  - Basics
  - Tacking (at least 4)
  - Gybing (at least 4)
- Crew Overboard (2 attempts)
  - Figure 8 *or*
  - Quickstop

The evaluation starts on the dock where you will rig a Rhodes 19. You will leave the dock and sail upwind to a mark, completing at least four tacks. You will round the mark (to either side) and sail downwind, completing at least four gybes. Sometime during the upwind or downwind, a crew overboard recovery will be performed. After you complete your gybes, you will dock the boat and then derig.

As you can guess from the skills above, we are not aiming for the evaluation to be tricky. The skills we touch on during the evaluation will not be the extent of the sailing skills that we cover during training, but they are the essentials that we want to ensure instructors are focusing on Day 1 of their arrival/return to Courageous. So, we want these skills performed well, as if students were in the boat. If you feel that this evaluation will be a breeze, and that, in fact, it is too easy--great! That is what we want. If all of our instructors get through this evaluation relatively problem-free on Monday, we will be able to use the entire rest of the week to focus on more interesting/fun/higher-level skills, like anchoring, towing, reefing underway, etc.

## Evaluation Instructions for Step Leaders/Evaluators

Our step leaders will be running sailing evaluations on two of their instructors during all-staff training. This is your chance to get a good view into how your instructors sail and their strengths and weaknesses in their boats. As well, it is a good reminder to you of our expectations for how we sail and teach at Courageous.

Each instructor who is assigned to you will take you out one-on-one for a ~45 minute sail on Monday, day 1 of training. You will be given a checkbox evaluation for each instructor that you should bring with you on the boat. They will have seen the evaluation beforehand, but they should be performing the skills without notes or reminders from you on what the precise expectations are. You will be guiding them through the evaluation abstractly and taking notes. *Remind them and encourage them to talk you through everything they are doing and thinking while going through the maneuvers. You should be in constant conversation with the instructor.*

During the evaluation, if you help the instructor with a skill or a particular checkbox, *do not then check that box off*. The point of the evaluation is that this instructor can, by themselves, perform all the tasks on the evaluation, to Courageous standards, every time. If you helped them or reminded them, that means they are not yet 100% on the task and that is totally okay--we want to know this information through the evaluation so that we can address it instead of finding out it is a problem later in the summer. On the other hand, feel free to *not* check-off items that didn't seem to be part of your experience with this instructor on the boat. If possible, note such omissions. Items that are red and have a circle instead of a box are negative items of note. These are issues that we will especially want to address if instructors are doing them improperly.

The instructor may choose which COB to attempt. They have two attempts total. If the instructor misses their first COB attempt or does not complete it perfectly, they may pick the dummy up and try once more. If they miss a second time, retrieve the dummy and move on to the next section of the evaluation.

The instructor is to complete the evaluation *single-handed*, but you should be ready to prevent collisions or safety issues if they arise. Each sailboat will be accompanied by a powerboat as well, which will be observing the evaluation. Feel free to add notes at the end of the pages, but please do try to address every checkbox that is on the evaluation. If you need to pause in order to check boxes and fill out the evaluation, feel free to quickly ask the instructor to wait while you do that--though it should be able to be done while non-maneuver sailing is happening.

### Example Dialogue for Step Leaders/Evaluators:

“So, we are going to start by rigging the boat. Please show me how you rig a Rhodes 19 and talk me through everything you do.”

[While they rig, take notes on how they are doing and check off the completed boxes in the rigging section of the checklist]

[Before moving on to the next step, if the instructor has missed any important rigging process, help them complete it so that the boat is safe on the water.]

“Okay, now we are going to leave the dock and go through some maneuvers, which you will do entirely single-handed, with me in the cockpit. Again, please explain out loud all that you are doing.”

[During/After they leave the dock, check off completed items in dock section]

“And now that we are on the water, sail us upwind to our mark, making sure to complete four tacks on the way” [you will be designated a mark to sail to] “Talk me through your tacks, and remember to use the tacking commands ‘Ready to tack’ and ‘Tacking’ (or ‘Ready about’ and ‘Helm’s a-lee’)”

[Take notes on their tacks. Sometime during the upwind sailing, throw the crew-overboard dummy out and have them complete a COB recovery of their choice. They have two attempts to pick the dummy up. If they need a second attempt, you can either first collect the dummy from the water and deploy it again, or the instructor can sail past the dummy and then re-start their recovery from there. Make sure they are talking you through their COB recovery process as best they can.]

[Once you have tacked upwind, completed the COB recovery and rounded the windward mark, sail downwind to the leeward mark, making sure to gybe at least four times.]

“Okay, so more than half of the evaluation is done, now we are going to sail downwind, and you are going to gybe at least four times on the way. Please be sure to be talking me through the downwind sailing and the gybes, and don’t forget the three gybing commands ‘Prepare to gybe’, ‘Gybing’, and ‘Gybe-ho’”

[Take notes on their gybes and downwind sailing, and once they round the leeward mark, you can complete the checklist for all the sailing basics as well, as they sail into the dock.]

“Great, so now we are going to sail into the dock, and derig. As before, just walk me through everything you are doing and try to talk me through how you are docking as we go in.”

[As they return to the dock, be ready to help prevent any collision or problem, but let them single-hand entirely, including getting off with the bow line and tying up themselves. After they tie up singlehanded, you can finish the notes and checkboxes as they derig (which they should still be talking you through).]

## Evaluation Instructions for Training/Evaluation Leaders

Our training/evaluation leaders will be observing the evaluations from a powerboat. You will be accompanied by the instructors who have already completed, or who have yet to complete their evaluation. This is a chance for the instructors to see the evaluation from the outside, either in preparation for their turn, or in order to continue thinking about their evaluation.

For our training leaders, this is a chance to be in constant conversation with the instructors on your powerboat, as you observe the evaluation. You should be talking about the stages of the evaluation, giving feedback to *the instructors on your powerboat (i.e. NOT the instructor being currently evaluated)* about things you see happening on the boat. Please do not give feedback to the sailboat or instructor who is being evaluated until after the evaluation, unless you need to stop the evaluation for safety reasons.

As well, in the powerboats we can be making sure that our windward and leeward marks are properly set and that the course properly enables at least four tacks and four gybes.

Instructor Name:

Evaluator:

“So, we are going to start by rigging the boat. Please show me how you rig a Rhodes 19 and talk me through everything you do.”

Rigging a Rhodes 19

Overall: Emerging -> -> -> -> -> Mastery

1  2  3  4  5

Emerging: Instructor has forgotten some rigging processes, can't complete it all single-handed, or makes mistakes that need correction

Mastery: Instructor quickly rigs boat without mistakes and is talking the evaluator through the process the entire time

Notes

- Checks for Pump, Paddle, Cushion, Anchor
- Jib properly attached
- !  Jib tack twisted
- !  Some jib hanks not attached?
- Jib tack carabiner/shackle and shackle at head of sail attached and fully closed
- Jib halyard NOT twisted around forestay or through the shrouds
- Jib sheets led through fairleads and blocks
- Fairleads adjusted? (extra points)
- Jib sheets have figure 8 stopper knots
- Main cover and jib bag folded NICELY and stowed in compartment
- Mainsheet uncoiled and uncleated before other work done on mainsail
- Boom softly lowered to the deck and boom crutch stowed in forward compartment
- !  Did instructor let go of the main halyard
- Main halyard not twisted around mast or backstay
- Instructor knew the orientation of boat before hoisting mainsail? (i.e. boat turned into the wind?)
- !  Mainsail raised before turning boat?
- !  Sailboat touched another boat while being turned?
- Is able to raise main single-handed
  - Mainsail flaked into place before raising (in order to make raising easier)
  - boom vang loose?
  - Main sheet uncleated?
  - Do they have a good method for getting the halyard up all the way on their own?
  - Scallops and creases of luff pulled out?
- Stows main halyard once mainsail is pulled up (does NOT coil and gasket)
- Tidied all lines?
- Is clear on all parts-of-boat terms
- !  Confuses parts-of-boat terms

“Okay, now we are going to leave the dock and go through some maneuvers, which you will do entirely single-handed, with me in the cockpit. Again, please explain out loud all that you are doing.”

Leaving the Dock

Overall: Emerging -> -> -> -> -> Mastery

1  2  3  4  5

Emerging: Instructor has issues leaving the dock, is not aware of the wind, is not aware of traffic, etc.

Mastery: Instructor pushes away from the dock and sails away without incident and without help from the evaluator

Notes

- Constant wind awareness before and during departure
- !  Seems sometimes unsure of wind direction
- Has and talks through appropriate plan to leave dock
- Pushes off in an appropriate way for the wind/current
- Is it a lee dock?
  - tacks boat off the dock, using the boom to push off?
- !  allows boat to be blown back onto the dock/other boats
- Unties lines in appropriate order, in control of boat
- Boat touches only water and fenders on way out

“And now that we are on the water, sail us upwind to our mark, making sure to complete four tacks on the way” [you will be designated a mark to sail to] “Talk me through your tacks, and remember to use the tacking commands ‘Ready to tack’ and ‘Tacking’ (or ‘Ready about’ and ‘Helm’s a-lee’)”

**Tacking**

Overall: Emerging -> -> -> -> -> Mastery

1  2  3  4  5

Uses tacking commands everytime ("Ready to tack?" "Tacking") Notes

Passes tiller behind back during tack

Uses tiller extension proficiently during tack

!     Over-tacks (i.e. steers further than close hauled after tack and sails are stalled?)

!     Under-tacks (i.e. doesn't complete tack to a close-hauled course and sails are luffing?)

Keeps mainsheet in hand during tack

Emerging: Instructor over- or under-tacks, forgets commands, cannot use tiller extension, drops the mainsheet

Mastery: Instructor tacks close-hauled to close-hauled, properly gives commands for tacking, is comfortable using the tiller extension during a tack and never lets go of the mainsheet.

**Crew Overboard Recovery (instructor may choose which procedure they prefer and tell you)**

"OH NOOOOOOO"

**QS**

Overall: Emerging -> -> -> -> -> Mastery

1  2  3  4  5

"Crew overboard" Notes

Assigns crew as spotter

Immediately to close hauled

1-2 boatlengths on close hauled course

Quick tack, while keeping eye on COB

Mainsheet cleated at close hauled position, jib left backing

Maintains 1-2 boatlength distance from COB

Gybes, luffing main and jib

Turns up to close reach, properly approaching COB

Judges momentum well to approach COB

Uses safety position techniques to approach COB

Came to a complete stop within reach to save COB

!   Had too much speed/overshot COB

!   Did not approach with enough speed

Windward side pickup: can they explain benefits?

Leeward side pickup: can they explain benefits?

Emerging: Instructor cannot pick up dummy, even on their second try, picks the dummy up at speed, runs over the dummy, etc.

Mastery: Instructor easily completes COB on their first try, stopping the boat at the proper place to retrieve the dummy

**F8**

Overall: Emerging -> -> -> -> -> Mastery

1  2  3  4  5

"Crew overboard" Notes

Assigns crew as spotter

Turns immediately to a beam reach

Sails approximately 4 boatlengths (depending on wind strength)

Quick tack, while keeping eye on COB

Turns down to broad reach from tack

Crosses own beam reach path on broad reach

Turns up to close reach at correct position

Uses safety position techniques to approach COB

Came to a complete stop within reach to save COB

!   Had too much speed/overshot COB

!   Did not approach with enough speed

Windward side pickup: can they explain benefits?

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Mastery: Instructor easily completes COB on their first try, stopping the boat at the proper place to retrieve the dummy

“Okay, so more than half of the evaluation is done, now we are going to sail downwind, and you are going to gybe at least four times on the way. Please be sure to be talking me through the downwind sailing and the gybes, and don’t forget the three gybing commands ‘Prepare to gybe’, ‘Gybing’, and ‘Gybe-ho’”

Gybing

Overall: Emerging -> -> -> -> -> Mastery  
 1  2  3  4  5

Emerging: Instructor accidentally gybes, sails by the lee without recognizing it, lets boom slam as it gybes, does not sheet mainsail in, rounds up, etc.  
 Mastery: Instructor gybes smoothly from deep broad reach to deep broad reach, properly gives commands for gybing, sheeting in without grabbing all the loops of purchase

Notes

- !     **Sitting on rail going downwind**
- Can find deep broad reach and sustain it until ready to gybe.
- Plans gybe with sufficient runway
- Once positioned on deep broad reach, announces "prepare to gybe"
- Traveler centered?
- Mainsheet sheeted to center of boat
- Waits until crew says “ready” before proceeding
- Announces “gybing”/”bearing away” before/as starting the turn
- Slow turn, minimal tiller movement needed to steer boat through gybe.
- !     **Moves the tiller same amount as in a tack**
- Seems to be aware of where the boat will be heading upon gybe completion
- Is able to use tiller and mainsheet together without problems
- Is looking at the sail as well as surroundings
- Announces “gybe ho”/”boom” as the boom crosses the boat
- Responds well on the tiller to the new forces on boat as mainsail switches sides
- Properly eases the mainsheet as the mainsail crosses the centerline of boat
- !     **Allows the mainsail to crash against cleated mainsheet**
- Mainsail eases smoothly without causing excessive steerage problems
- In control during sail change
- Keeps boat solidly on new broad reach
- !     **Over-steers the gybe (i.e. boat ends up on a beam reach)**
- !     **Boat rounds up due to bad sail control**
- !     **Under-steers the gybe (i.e. boat gybes back, sails don’t switch sides, etc.)**

Basics

Overall: Emerging -> -> -> -> -> Mastery  
 1  2  3  4  5

Emerging: Instructor isn’t using telltales properly, is having problems singlehanding, doesn’t stay aware of traffic, responds poorly to puffs, or is unaware of the wind direction  
 Mastery: Instructor sails in the groove, uses telltales properly, always knows where the wind is coming from/points of sail, is always aware of traffic, never has problems responding to puffs and uses the tiller extension.

Notes

- Maintains straight course/maintains POS if not trying to turn
- Is able to adjust mainsail and steer at same time
- Keeps mainsail properly trimmed
- Is able to handle the jib single-handed
- !  **Lets go of the mainsheet while sailing**
- Knows direction of wind when asked
- Always knows point of sail (is trimming mainsail properly to the current POS, is looking at telltales, etc.)
- Is using tiller extension comfortably, passes it behind back on tacks and gybes
- !  **Generally uncomfortable on the tiller extension**
- Is using telltales to determine proper sail position/steering (and telling you about it!)
- !  **Does not seem to use telltales; does not know what telltales should be doing**
- Responds to puffs, shifts, lifts, and/or headers in appropriate ways  
 (eases mainsheet slightly, keeps in the groove while upwind, uses telltales, etc.)
- Is aware of traffic
- Thinks about and properly obeys right-of-way rules

"Great, so now we are going to sail into the dock, and derig. As before, just walk me through everything you are doing and try to talk me through how you are docking as we go in."

Returning to the dock

Overall: Emerging -> -> -> -> -> Mastery  
 1  2  3  4  5

Emerging: Instructor cannot complete a docking singlehanded, instructor collides with dock, cannot control speed, approaches at the wrong angle, has to stop boat by hand, etc.  
 Instructor can singlehand the sailboat into the dock, without aid from the evaluator.  
 Mastery: BOAT TOUCHES NOTHING BUT FENDER AND WATER, with boat under control, instructor positions boat to stop perfectly at the dock, instructor steps off with bow line

Notes

- Constant wind awareness on approach
- !  Seems sometimes unsure of wind direction
- Has and talks through plan to return to dock
- Starts thinking/talking about the docking before entering the slip
- Readies bowline/docking lines long before needed, before entering slip
- Is it a lee dock?
  - Knows it is a lee dock and knows how to dock in such conditions
  - brings mainsail down outside of slip in order to come in on jib alone?
  - handles the boat well under jib alone
- Controls sail in order to approach with proper slow speed
- !  Brings mainsail down before touchdown, even though it is NOT lee dock
- Uses safety position techniques to stop the boat at the dock
- Positions boat perfectly at dock, stepping distance away, no bumping/touching of dock/boats
- Boat touches only water and fenders on way in
- Successfully aborts a bad docking plan? (Aborting a bad plan = extra points)
- !  T-bones into dock, bounces off fender, other hard landing?

Securing Boat

Overall: Emerging -> -> -> -> -> Mastery  
 1  2  3  4  5

Emerging: Instructor is not able to properly tie the boat up without extra direction or help  
 Mastery: Instructor ties the boat up perfectly to Courageous standards while talking the evaluator

Notes

- Shows proficiency at rotating boat at dock
- Adequately secures boat to dock
  - Midships to fender
  - Stern line runs astern, not perpendicular to dock, below other boats' bowlines
  - Bow line runs forward, not perpendicular to dock, above other boats' lines
  - Remembers to put fender out in preparation for tying up next outside boat
- Adequately secures boat to inside boat
  - Forward spring line is lead to inner boat's spinnaker block and cleat
  - Aft spring line is lead from stern cleat of inner boat (i.e. the tail of the stern line)
  - Aft spring line is above forward spring, to jib block and cleat
  - Understands interaction of spring lines (i.e. forward spring: boat forward and stern in; aft spring: aft)
  - Remembers to put fender out in preparation for tying up next outside boat
- Docking lines lead to the proper side of cleat first (i.e. far side of cleat first)
- Understands interaction of bow, stern and spring lines
- Stern and spring lines are not crossed at the boat's cleat (i.e. where they are attached to the boat)
- Ensures lines are tightened properly before leaving boat
- Perfect cleat hitch and tails of docking lines neatly stowed near cleats

"And the final task is to completely derig the boat, and talk me through the derigging as much as you can."

Derigging

Overall: Emerging -> -> -> -> -> Mastery  
 1  2  3  4  5

Emerging: Instructor forgets derigging details, puts things in the wrong place, or uses the wrong processes for derigging  
 Mastery: Instructor beautifully derigs and stows all components of boat to Courageous derigging standards

Notes

- Doesn't let go of halyards while detaching
- Boom crutch put under boom and main sheet tightened against it
- Tightens and cleats mainsheet, neatly coils and hangs from bail of boom
- Tightly rolls mainsail, folding to top batten first
- Mainsail cover put on nicely (if sail doesn't fit in cover, sail isn't rolled tightly enough!)
- Jib halyard properly attached to mast ring (not twisted around stays, etc.)
- Cockpit end of halyards tightened and stowed neatly
- Jib tightly rolled (extra points for NOT doing it on the cement of the dock) (Should be rolled on bow of boat)
- Jib stowed, in its bag, on port side shelf, with jib sheets outside of jib bag, neatly stowed
- Rudder/Tiller removed and stowed properly (Rudder flat under cabin, tiller and tiller extension on seat)