



CAL SAILING CLUB

Instructional Guidelines for Teaching in Lido 14's

Revised February 1997

Background.

The purpose of this manual is to assist the instructor in giving lessons to both beginning students and those working toward their Junior Skipper rating. For new Juniors who have not yet taught lessons, this manual will provide step-by-step instructions; for experienced instructors, it may provide some tips you haven't considered before. Although teaching styles and techniques differ from instructor to instructor, there should be consistency in the scope of instruction and emphasis on safety. Each student should eventually learn all of the basic sailing skills required to successfully pass the Junior written, rigging and practical sailing tests regardless of instructor.

The wording in this manual is intended to be as simple as possible, and it is suggested that you similarly avoid confusing students. Keep your instructions simple, clean and uncluttered. The suggested teaching program is organized into six phases as opposed to lessons. A phase may take more or less than one lesson to complete. If a student has not grasped a maneuver in one phase, do not proceed to the next phase. Be sure to ask each student before you leave the dock what experience level they are at, so you can tailor your instructions accordingly. If you are unsure of the student's abilities, test the student by having him/her perform some basic tacks before letting him/her perform jibes or other more difficult maneuvers. The guidelines are arranged as follows:

- Phase I, Getting Started; Points of Sail
- Phase II, Leaving the Dock; Tacking and Heaving To
- Phase III, Jibing
- Phase IV, Person-Overboard Retrieval
- Phase V, Docking; Use of the Hiking Stick
- Phase VI, Advanced Maneuvers

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Phase I - Getting Started; Points of Sail

A. GENERAL PROCEDURES

The following general procedures should be followed each lesson, regardless of the phase:

1. Sign out students. Check the lesson sign-up sheet, and round up the next three students on the list. Put your name on the skipper list, writing down the required information, including boat and sail number next to each student going with you. This helps the Dayleader know where people are, and students and other instructors figure out who's next in line. Sign back in when your lesson is complete.
2. Talk to your students. All students need instruction and feedback on their performance. Don't just sit there and expect them to learn on their own. Ask students about their sailing experience. Explain the requirements for a Junior Skipper rating. Be friendly and supportive.
3. Don't keep students waiting. Less than three students per boat is preferable if there are plenty of instructors, but the main thing is to prevent students from waiting around when they can be on the water getting instruction. You should therefore always take the maximum number of students if there are people waiting for lessons, unless wind conditions are so gusty as to make a smaller number safer. Keep the lesson limited to about an hour (i.e., about 20 minutes per student).
4. Be flexible. Other instructors will vary in their teaching techniques and sailing methods (particularly with regard to looking fore or aft when tacking and jibing). Do not confuse students by insisting on using a method different from what they have been previously taught -- instead, familiarize yourself with the different techniques in order to assist the student in perfecting the one particular method they are comfortable with.
5. Reefing. Reef the mainsail when winds are even slightly strong, unless all students are advanced. It does no good for inexperienced students to be distracted by their fear of capsizing.

B. AT THE DOCK

1. Define basic terms. Point out the mainsail, jib, sheets, and tiller. Either at the dock or while underway, define heading up, falling off, close reach, beam reach, broad reach, close-hauled, and running. Encourage beginning students to thoroughly study the blue CSC manual.
2. Ask students if they can swim. You should know what students may need special assistance in a capsize. All students and instructors must wear life jackets. It may seem obvious, but remind students to stay with the boat if it capsizes.
3. Boarding the boat. Explain how to get into the boat -- i.e., walk down the centerline of the boat, holding onto the forestay, mast, etc., and be sure that people already in the boat do not all sit on the same side of the boat.
4. Seating position. With three students, it's usually best to place one student on each side in front, with you sitting next to the student at the helm or straddling the centerboard case, ready to grab the mainsheet and/or tiller if necessary.

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C. USE OF TILLER AND MAINSHEET

1. Leaving the dock. Let the most experienced student (or yourself if all beginners) take the helm leaving the dock. This is usually too complex for a basic beginner, and could result in crashing into other boats or the dock.
2. Initial course. Have the beginning student initially sail on a beam reach, with you controlling the main sheet. All Phase I lessons should be started on a beam reach.
 - a) Tiller use. First explain how to hold and move the tiller. The student should sit forward of the tiller, with the hand closest to the stern on top of the tiller. You should control the mainsheet at this time. Explain that when you say "head up" you mean turning the bow into the wind (accomplished by moving the tiller toward the sails); "fall off" means to turn the bow away from the wind (accomplished by moving the tiller away from the sails).
 - b) Using tiller and mainsheet. Once the student is comfortable steering the boat, teach the student to control both the tiller and the mainsheet. This can be very confusing for some students, since they must concentrate on two separate tasks simultaneously, and in strong winds you must be prepared to release the mainsheet if a capsize seems imminent. Do not let a beginner use the hiking stick; this should be used by experienced students only.
 - c) Weight distribution. Explain how to distribute weight to correct the heel of the boat.
 - d) Preventing a capsize. Explain three methods to prevent capsizes: releasing mainsheet, heading up, and/or hiking out. Emphasize that releasing the mainsheet is the most effective method for a beginning student to handle a large puff of wind. Heading up and hiking out are more efficient when the students become more experienced.

D. POINTS OF SAIL

1. Practice sailing different reaches. Have the student steer the boat through the various points of sail. In explaining the various points of sail, describe the relationship between the position of the sails and the course the boat is sailing. Note the major difference between the use of sails when sailing a close reach or beam reach (sails act as airfoils -- telltales on jib stream straight back; mainsheet is let out until mainsail luffs, then pulled in until the mainsail just stops luffing), and the use of sails when sailing a broad reach or running (sails act like parachutes -- jibsheet is let out until jib just starts luffing; mainsheet is let out all the way, or until boom is close to but not touching the shroud).
2. Keep sails full. Note that regardless of the heading the sails should be kept as full as possible without luffing. There is an exception -- the mainsail may have a luff in it when beating (sailing close-hauled), particularly in heavy winds (i.e., a "fisherman's reef" -- having the mainsail out enough so that excessive heel is reduced). The jib should generally be kept sheeted down when beating. If you find that you continually need to carry a "fisherman's reef", you should reef the mainsail to minimize damage, reduce the risk of capsizing, and calm nervous students.
3. Running. Discuss the danger of accidental jibes. If you teach jibing while looking toward the stern, the student should be facing that direction at least half the time while running, so that s/he begins to have some conception of the direction from which the wind is coming. This will make it easier for the student to jibe.

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4. Tacking. Unless the student is a quick learner or you are able to give a long lesson, you should delay teaching how to tack for their next lesson. If a course change is required to keep the boat within the sailing area, you could just have the student steer the boat through a tack (tell them what point on the shore to steer to) while you handle the mainsheet.

PHASE II - Leaving the Dock; Tacking and Heaving To

A. AT THE DOCK

1. Review briefly Phase I terminology -- mainsail, jib, sheets, tiller and rudder, points of sail.
2. Phase II terms. Point out and explain halyards, shrouds, forestay, boom vang, centerboard, outhaul, telltales, cunningham, gooseneck, and traveler. Define windward, leeward, starboard, port, forward and aft.

B. LEAVING THE DOCK

1. Sailing backwards. Any student who has completed Phase I should be able to take the boat away from the dock. The boat should be cast off from the dock with the bow pointing as close into the wind as possible. Both the main and the jib should be free. As the bow falls off the wind, steer the stern away from the wind to keep bow pointed into the wind by moving the tiller slightly to the side opposite the boom (keep the tiller parallel to the boom). Note that it will be easier to sail backwards if the weight in the boat is balanced.
2. Falling off. When you are clear of all obstructions and while sailing backwards, push the tiller to port (assuming a westerly wind) and the bow will fall off to port and the student can sail off on a beam reach. Have the student practice sailing backwards at least two boat lengths before falling off.
3. Gaining headway. In gaining headway, it is convenient and practical to sheet in the jib first, before the main, to be certain to have enough lee helm to clear adjacent obstructions.

C. TACKING

Explain the procedure for tacking (or coming about) to all the students in the following manner. This example has the student facing aft when tacking.

1. Tack from close-hauled. Explain that one tacks from a closehauled position with the wind on one side of the boat to a closehauled position with the wind on the other side of the boat, which is a turn of approximately 90 degrees. Beginners will find it helpful to pick a landmark 90 degrees windward of their current course before coming about.
2. Crew. Check to see if the crew knows how and when to release the jibsheet. When the student at the helm is prepared to tack and says "ready about" the crew uncleats the jibsheet and holds it tight but ready to release. When the crew has done this s/he responds "ready".
3. Tiller hand exchange. Explain the tiller hand exchange as follows: With the hand nearest the stern holding the tiller, as the student turns the boat and switches sides (facing aft) s/he switches hands (the student will have to let go of the mainsheet while switching sides) so that when s/he is on the

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"new" side the hand closest to the stern is grasping the tiller and the other hand may now hold the mainsheet. Note that the tiller can be raised. The sail and the student should cross the boat at the same time in opposite directions, and the student should end up forward of the tiller after the tack (to prevent the student from sitting on top of the tiller and preventing him/her from straightening out the boat). The tiller should be returned to the centerline of the boat to check the turn of the boat and prevent it from going beyond a close-hauled position (no more than a 90 degree turn).

4. Tacking maneuver. The student may now start the tacking maneuver with the command "helm's alee". Upon this command, s/he pushes the tiller toward the sail (gradually, not hard) and completes the tack as described above. Under no circumstances should the tiller be released. The crew should hold the jib taut after the command "helm's alee", until the jib is fully luffing, and only then release the jib and pull it in on the other side of the boat. In light winds the crew will have to help pull the lazy sheet through the fairlead.
5. Strong winds. The student should be cautioned not to oversteer the tack in strong winds. This is a major cause of accidental capsizes. Sheeting in and cleating the jibsheet prematurely can also cause similar problems. Advise the student not to tack in large waves, but wait for relatively flat water. The mainsheet can remain cleated during a tack in light winds, but should be uncleated in strong winds to avoid capsizes.

Tacking looking forward. The previous description is based on looking toward the stern when tacking. Tacking while looking toward the bow is also acceptable, and only differs in the tiller hand change. For this method, the student holds the tiller with the hand nearest the stern, and the mainsheet in the other hand. Then, as the student switches sides, s/he reaches behind his/her back with the hand holding the mainsheet and grasps the tiller with the same hand. Then, after straightening out the boat, the mainsheet can then be transferred to the other hand.

D. HEAVING TO

1. Heave to maneuver. The easiest way to heave to is to simply keep the jib cleated in during a tack. The student should say "Ready to heave to" instead of "Ready to come about". After the student comes about and the jib is backwinded, the student should release the mainsheet and slowly push the tiller to the lee gunwale (to avoid coming about again).
2. Reasons to heave to. The counteracting forces of a heave-to boat will result in a relatively balanced boat which will slowly drift downwind. The force of the wind on the jib pushes the boat off the wind while the rudder position heads the boat up into the wind. The maneuver can be used for such things as changing students at the helm, repairing damaged equipment, anchoring, or any other activity requiring a stable, non-moving boat.

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PHASE III - Jibing

A. JIBING

Talk through everything the student will have to do to jibe, demonstrate the technique to the student, and then have the student do it. As in tacking, jibes can be performed either looking toward the stern or toward the bow. Experienced sailors differ in the particulars of jibing, and the following example (looking toward the stern) should not be considered the only way to jibe.

1. Start from a dead run. The jibe should be started from a dead run (when the shroud telltale streams straight ahead, and the jib collapses when on the same side as the mainsail), and not from a broad reach or from a position of sailing by the lee. Starting the jibe from a dead run makes the jibe much more stable albeit less "exciting". Distribute the crew so that the boat sails on an even keel. Warn them to keep low so that the boom cannot hit them.
2. Jibing maneuver. The student should be between the tiller and the boom. After the student has become accustomed to facing the wind, with the tiller placed against his/her hip or side, s/he should say "prepare to jibe" and begin pulling in the mainsheet (between the traveler and the boom) hand over hand. Pulling in the mainsheet will cause the boat to head up into the wind, and will generally cause the tiller to be pushed against the student's side, so the student can steer by moving his/her body from side to side. S/he may have to reach down and grab the tiller occasionally to steady the boat, especially in light winds. It may help to steer a course slightly up from a dead run. After the boom is pulled in almost to the centerline of the boat, the student should hold the mainsheet with the hand closest to the boom (do not hold the boom itself), grasp the tiller with the other hand, say "jibe ho", push the tiller away from him/her to fall off, and duck his/her head as the wind pushes the boom across the centerline of the boat. The tiller should then immediately be moved opposite to the direction of the boom, in order to return the boat to a dead run. The mainsheet should be let out through the hand to save wear and tear on the traveler and rigging.
3. Tiller movement. In performing the jibe, the actual movement of the tiller should be minimal (4 to 6 inches away from the centerline). Because the boat responds slowly to the tiller/rudder movement, the student should not push the tiller an additional amount unless it becomes obvious that the boat will not jibe. This usually happens at times when the jibe has been started from a broad reach and not from a dead run. Repeat jibe several times.
4. Strong Winds. Instruct the student to keep the boat on a dead run throughout the jibe, as this will be the most stable course. Many students either let go of the tiller or apply little resistance to the tiller after a jibe, which results in the boat immediately heading upwind, generating strong heeling forces and potentially ending in a capsize. The student should be told to strongly resist the tiller being pulled from him/her after a jibe in strong winds.

Jibing looking forward. For jibing while looking toward the bow of the boat, have the student pull the mainsheet in from between the mainsheet cleat and the boom, instead of from between the traveler and the boom. The advantages of looking forward are the ability to watch the main, jib, telltale and obstacles in your path, and less disorientation for beginners.

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Phase IV - Person-Overboard Retrieval

A. PERSON-OVERBOARD RETRIEVAL

To gain a Junior Skipper rating, the student will be required to sail alongside a floating object coming practically to a stop and to take the object aboard using the following basic procedure. Before using the plastic bottle person-overboard, you should have the student practice slow sailing -- sail on a close reach and slow sail as explained in paragraph 3 below.

1. Immediate assistance. After the person-overboard is thrown in the water, the student should call out "Person Overboard!", and assign a specific person to keep it in view.
2. Getting into position. It is now necessary to sail to a point where the boat can return and stop alongside of the person-overboard in a strictly controlled manner. This point will generally lie on the course of a moderately close reach approaching the person-overboard. This entails changing course to a broad reach immediately after the person goes overboard (falling off if on a close or beam reach, heading up if on a run). Then, after sailing downwind a reasonable distance, the student will tack and begin approaching the person-overboard. The student should let the mainsheet out all the way, and while sailing straight toward the person-overboard, look at the mainsheet -- it will droop in the water if the boat is on a close reach.
3. Approaching the person-overboard. At this point the student should be cautioned not to sail full speed toward the person-overboard, hoping to go into irons exactly alongside it. Instead, slow sail up to the person-overboard, as you would approach a dock. That is, continue on a close reach (not close-hauled), and with both sails luffing, pulling in the mainsheet from between the traveler and the boom to gain forward momentum, letting it out to slow down. The student should not slow down too much, especially in strong winds, as the boat will tend to slip excessively to leeward.
4. Maneuvering. Fine adjustments in course can be safely made until the person-overboard is within inches of the boat, even in very rough weather. Large adjustments should be made early permitting precise final positioning. If the boat is too far off the wind, the mainsheet will be taut, and the student will not be able to slow down the boat; the student must correct the course by falling off briefly and immediately returning the course straight toward the person-overboard until the boat is on a close reach and the mainsheet droops in the water. Falling off too far will require additional tacking to reach the person-overboard.
5. Recovery. Properly conducted, slow sailing allows the student or crew to leisurely reach overboard on the windward side and pick up the person-overboard. Actual persons brought in the Lido can be lifted over the transom or gunwale. While the boat is nearly stopped as it luffs up to the person, it is a simple matter to heave to by back-winding the jib and moving the tiller to the leeward side of the boat. It may help to have the person hook a leg over the side to assist in pulling them in.

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PHASE V - Docking; Use of Hiking Stick

A. DOCKING THE BOAT

1. Slow sailing. In docking the boat, the crucial factors are knowing where the wind is coming from and how fast the wind is blowing. The recommended technique is slow sailing to the dock on a close reach, similar to the procedure used in recovering a person-overboard. Ideally, the boat should be sailed slow enough that the boat stops right next to the dock, allowing the crewperson on the foredeck to just step off and tie up the boat. Considerable damage is done to the Lidos by people docking the boats too fast and banging into the dock. The boat should also approach the dock at an angle that will allow the crewperson on the foredeck to step off without interference from the jib.
2. Reducing speed. Like recovering a person-overboard, large course corrections should be made early. If for some reason the student is travelling too fast as s/he nears the dock and wishes to reduce boat speed quickly, there are several methods to use:
 - a) Using the tiller as a brake. The student can move the tiller hard to one side of the boat, hold it there a couple of seconds, and then move the tiller hard to the other side of the boat, hold it there a couple of seconds, and so on. Hard over means "far over", not "violently over". Not only will the resulting zig-zag course of the boat give a greater distance in which to slow down, but the rudder will also exert a good deal of braking power. Furthermore, by feeling how the boat responds to the tiller, the student will get an idea of just how fast the boat is going through the water.
 - b) Using the mainsail as a brake. If the boat is still travelling too fast after using the tiller braking method, have a crewperson push the boom forward to backwind the main, using wind pressure against the main as a brake.
 - c) Shooting into the wind. This is done by heading the boat into the wind until the sails are fully luffing along the centerline of the boat (the jib and mainsail will both be released since the boat is being slow-sailed). This procedure is called "shooting into the wind" (going into irons) and is not recommended as standard docking procedure since the student will lose ability to regain speed if s/he overestimates how fast s/he is approaching the dock.
 - d) Aborting. These speed-reducing procedures for braking the boat should not be used as a substitute for slow sailing, but as last-minute contingencies to avoid hitting the dock. It is preferable to have the student abort the docking maneuver if it appears his/her course and/or speed will result in a crash, and then try again.
3. Docking with an east wind. With an east wind, the mainsail should be lowered and the boat sailed to the dock under jib alone, unless the west side of the dock is available for docking.

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B. USE OF THE HIKING STICK

1. Position. The hiking stick is held in the hand nearest the stern, the mainsheet in the hand nearest the bow. The student sits forward of the tiller and the hiking stick. Note that the student can place his/her toes under the top of the centerboard case to help balance him/herself.
2. Tacking using the hiking stick.
 - a) The student, while sitting on the gunwale, pushes the tiller hard alee with the hiking stick.
 - b) As the student crosses the boat, s/he pivots the stick toward the stern and changes hands. The tiller should always be under control.
 - c) The hiking stick is now re-extended and the student sits on the new windward gunwale. When first learning this maneuver, it may be easier to have the student sit on the new windward seat prior to hiking out on the gunwale.

PHASE VI - Advanced Maneuvers

The following maneuvers are for students obviously proficient at the basic maneuvers (tacking, jibing, person-overboards).

A. ANCHORING

1. Reasons to anchor. The anchor on the Lido is predominantly used to prevent the boat from drifting onto the rocks along the lee shore. This can occur due to equipment failure (broken shroud, etc.) or the inability to right a capsized boat (due to water-filled buoyancy tanks or lack of experience). Anchoring is also the preferable way to reef the mainsail.
2. Sailing backwards. Assuming the boat is sailable, one method is to anchor while sailing backwards. First, make sure the anchor rode (rope) is tied to the boat, and is clear and not knotted up or caught on anything. Then, the student will bring the boat into irons, steering the boat directly into the wind until the boat stops and begins to drift straight backwards. It is important to have the crew evenly distributed to keep the boat level, and have all sheets loose.
3. Heaving to. You may also anchor the boat from a hove-to position. Simply have the student heave the boat to, then proceed with anchoring.
4. Dropping anchor. As the boat is steered backwards (or is hove to), one of the crew will take the anchor and pass it under the jib sheets between the mast and the shroud, and drop it over the side. The crewperson will assure the anchor has taken hold by pulling on the rode and feeling whether there is tension and no vibrations. If it is not holding, pull up the anchor to check if it is clogged with seaweed or other debris. Once anchored, lower your jib to prevent damage to the sail from flogging in the wind.

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5. Pulling up anchor. When done anchoring, the foredeck crewperson will pull in the anchor. In large waves, pull in the anchor after the crest of the wave passes, as the boat slides into the trough, not as the boat rides up the crest of the next wave, to make the pulling easier. Because there is a lot of mud in this area, the crewperson should dunk the anchor up and down in the water when s/he gets it to the surface, to wash off the mud. The jib can then be backwinded as appropriate to help the bow to fall off and start sailing.

B. SAILING IN CIRCLES

Have the student sail the boat in circles as close as possible to a buoy (or use a person-overboard). It may help to have the student begin by sailing larger circles, not around a buoy, to get used to continuously tacking and jibing. It helps to have the student pull in the mainsheet from between the traveler and the boom (if tacking and jibing looking backwards) or from between the cleat and boom (if looking forwards) instead of through the cleat, to save time and tighten up the circles. This maneuver works best if the crew is skilled in handling the jib sheets. The instructor may want to handle both jib sheets if the remaining crew is inexperienced.

C. CAPSIZING

The procedures for righting a capsized boat are fully covered in the blue CSC manual. Students should be encouraged to practice capsizes, but only with a willing and prepared crew. Use of wetsuits is highly recommended, so several capsizes can be accomplished at one time without risking hypothermia. Be sure to advise the Dayleader of your intention to practice capsizes.

Cal Sailing Club

Junior Skipper Practical Sailing Test

Frequently Asked Questions

Who gives Junior tests?

Senior Skippers, Cruising Skippers, and specially designated Junior Skippers (those who have passed the Senior dinghy practical sailing test) may give Junior Skipper practical sailing tests. People wanting to take the test can find a list of these skippers on the bulletin board on the back wall of the clubhouse, or can ask the Dayleader to point them out. If you have trouble finding these skippers, try calling them and make arrangements to meet at a specific time. Persevere!

When can Junior tests be given?

Junior sailing tests must be given when winds are at least ten knots (12 miles per hour). Ten-knot winds are common in the summer, but infrequent during the winter. Wind speed can be observed on the anemometer (wind speed indicator) in the clubhouse. As a rule of thumb, if you see whitecaps on the water past H's Lordships Restaurant, the wind is over ten knots. Junior sailing tests are commonly given after Saturday morning lessons and Sunday morning races, but they can be given anytime sufficient wind and a tester are available.

How should you prepare for the test?

Practice the sailing maneuvers described in the blue CSC handbook or the "Instructional Guidelines for Teaching in Lido 14's". Concentrate on performing tacks, jibes and person-overboards in increasingly stronger winds up to (and over) ten knots. During a lesson, ask your instructor to show you how to perform maneuvers you have not tried yet. Get as much sailing time as you can -- it really helps if you can take a couple of lessons each time you come down. Or, ask a skipper to take you out by yourself for an hour or so to get in a lot of practice. You are not expected to sail perfectly -- you should be reasonably competent and obviously able to sail a Lido on your own without endangering yourself or others. Complete all the other requirements -- written test, rigging test, and two hours extra work (in addition to the regular two hours per quarter).

How should you be prepared the day of the test?

On the day of the test, it is recommended to bring a change of clothes (or a wetsuit) and a towel. Rig a Lido, or obtain one already rigged. Be sure to fully examine the Lido before taking the test, to assure that all the required equipment is on board, sails are properly rigged, and nothing is broken.

What maneuvers will you be asked to perform?

You will have to perform at a minimum the following maneuvers: leaving the dock (sailing backwards), tacking, jibing, person-overboard retrieval, anchoring, capsize recovery, and docking (slow sailing). In addition to these basic maneuvers, you probably will be asked to perform one or more of the following maneuvers: sailing in circles around a buoy, heaving to, and reefing the main while under way.

What do you do after the test?

Before you celebrate, have the person who gave you the test sign off on your card to make it official. Move your card from the novice book to the Junior Skipper book. You can now take out a Lido on your own anytime a Dayleader is there. You can now also get yourself checked out to use the other Junior Skipper dinghies, including Lasers, Bytes, Rhodes 19's the 470 and the JY-15. Pass the written racing test, and start skippering in the Sunday morning Lido races. Start taking keelboat lessons (Wednesday evenings at 6:00 at J Dock). You're encouraged to also start teaching students yourself. It's a great way to improve your own sailing, help out the club, and earn free memberships.