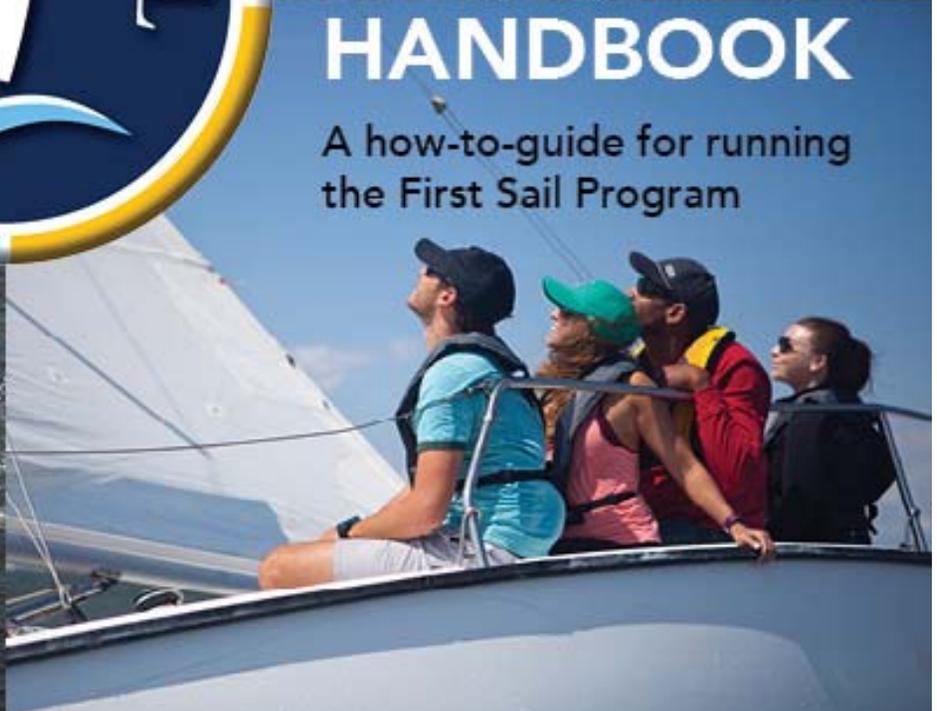




# PROGRAM HANDBOOK

A how-to-guide for running  
the First Sail Program



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## About First Sail

First Sail is a nationwide initiative created in the summer of 2016 by US Sailing with support from sailing schools, community sailing centers, yacht clubs and other sailing industry organizations around the United States. The goal of First Sail is to educate the public on the benefits of sailing as a fun and exciting recreational activity and sport for people of all ages and abilities. First Sail offers a pathway to participation through resources on finding a place to learn and how to get started and be prepared.

The First Sail Experience offers beginners an introduction to sailing in a casual setting. The First Sail Experience is offered by our growing list of First Sail Locations, who are fully committed to providing a memorable experience for all participants that will motivate newcomers to take the next step.

## How First Sail works

The First Sail Experience is structured so that it aligns with your existing programming, rather than require you to do something completely new. The two-hour “First Sail Experience” is designed to be taught in day-sailing keelboats and serve as a starting point to other programs you have available. If you currently offer any type of “Introduction to Sailing” course, it’s quite likely that with very little modification you’re ready to be considered a First Sail Location.

Once you sign on as a Location, you’ll be able to add your First Sail Experience to a national common calendar and get access to a myriad of customizable marketing materials. Additionally, all students who participate in a First Sail Experience get access to *Basic Keelboat Online*, US Sailing’s online training course, ensuring that they’re better prepared for their first opportunity on the water.



## Running the First Sail Experience

This guide provides a step by step overview on how to implement the First Sail Experience. To be considered a First Sail Location there are a few basic requirements: Adopting a standard price point, utilizing a day-sailing keelboat, using the common curriculum and consistent verbiage in all marketing. The requirements are in place to help ensure that the customer has a consistent experience, regardless of where they participate in the program. However, beyond those requirements there is a significant amount of flexibility to meet your needs as an organization.

**REGISTER** Sign up your organization at [www.firstsail.org/firstsail-location](http://www.firstsail.org/firstsail-location)  
Make sure your organization meets the "First Sail" requirements.

**SCHEDULE** Create a First Sail Experience using [your online registration system](#) and then add it to the Common Calendar.

**PROMOTE** Use the marketing toolkit to help promote your First Sail Experience both digitally, and in print.

**PREPARE** Make sure your location, and your instructors, are ready to run the program.

**SAIL!** Hit the water!  
Here's your chance to showcase your organization and share your love of sailing!

**NEXT STEPS** Determine how to keep people engaged. Social events, evening racing or more course opportunities are all great options.



To register as a First Sail Location, visit <http://firstsail.org/firstsail-location> and enter information about your organization. To ensure that participants have a consistent experience, regardless of where they take the course, we have outlined a few requirements that host locations must abide by:

## 1. Adopt the common price point (\$50 per person for 2-hour course)

We require that all First Sail locations charge the same amount for the program. While we understand that there are a variety of factors that go into course pricing, the First Sail price point was developed after reviewing over 50 schools across the United States. We feel that this price point conveys a value without creating an unnecessary barrier to access.

## 2. Use a day-sailing keelboat

Keelboats have been chosen for this program because they provide a very stable platform and, in most cases, offer a comfortable experience to the participants. There is flexibility as to what type of keelboat you utilize, but here are a few general guidelines:

- A conventional mass-produced commercial Marconi sloop-rigged vessel between the lengths of 18-27 feet, which includes a ballasted keel sufficiently weighted by manufacturer's design to be self-righting in normal operating conditions and with standard suit of non-flying sails.
- The cockpit must be self-bailing and/or have positive flotation, and the vessel may have lifelines.
- Boats should have fenders and at least six (6) dock lines per vessel.
- The vessel must be tiller steered.
- Auxiliary propulsion is not a requirement for vessels.
- Where applicable, all USCG requirements and all other statutory requirements must also be met, and a USCG Auxiliary courtesy exam is recommended.

## 3. Have a maximum class size of 6 participants (or less, depending on vessel)

The size of the boat you are using will dictate the participant to instructor ratio. On a boat in the 18'-22' range you will want to have a smaller number of participants, whereas if you are using a boats at the upper edge of the size ratio may allow for an increased number of students. There is flexibility, but the course size should not exceed a maximum of six participants. A proper ratio will ensure that all participants have the opportunity to helm the boat and also trim the sails. A full overview of those requirements, and a list of required safety equipment can be found at <http://www.uscgboating.org/images/420.PDF>



#### 4. Make the course available to the public

Any organization offering the First Sail Experience must make it available to the public. We ask that organizations not hold “in-house” First Sail Experiences.

#### 5. Utilize the First Sail Branding

In order for participants to get the full benefit of the First Sail Experience, we’re asking that all Locations direct people to the First Sail website. Once there, they will enter in some simple information that will allow us to provide them with a seamless registration in *Basic Keelboat Online*.

#### A few additional recommendations:

##### Staffing Requirements

- As this program offers no formal certification or endorsement, a US Sailing instructor certification is highly recommended, but not required. Individuals who have been trained in either the Small Boat or Keelboat Instructional programs will be better equipped to facilitate the Experience.
- Instructors should wear USCG approved lifejackets while on the water at all times and should also wear close-toed shoes.
- Instructors should carry a working VHF radio whenever they’re on the water. Having a mobile phone is also recommended.

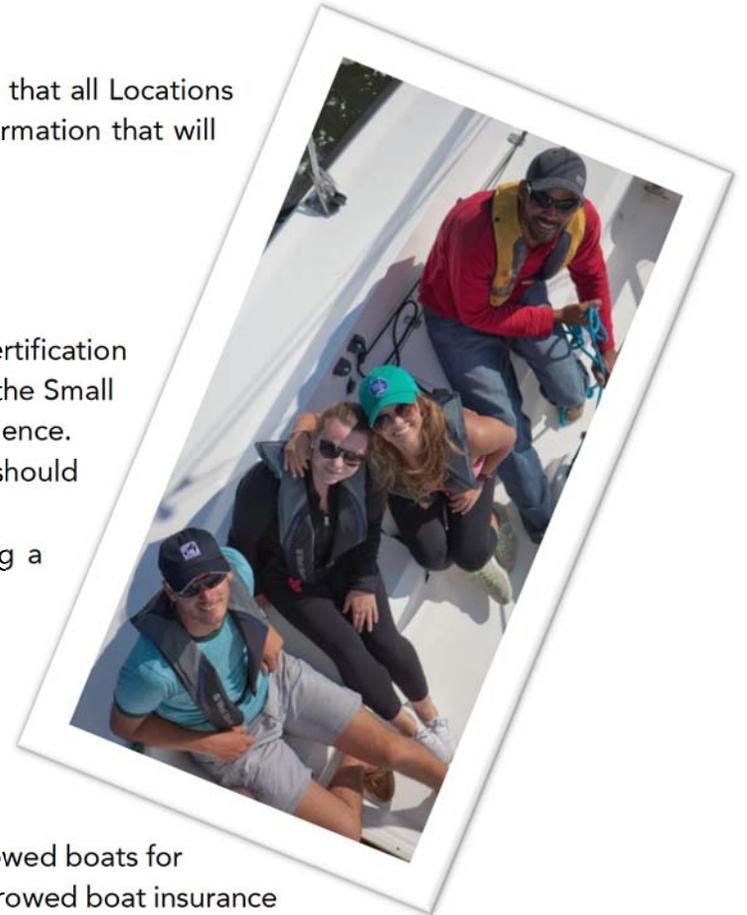
##### Insurance/Liability

This program, while developed and supported by US Sailing, is run as an extension of your own organization’s programming. Should you have any questions regarding the insurance liability, please contact your insurance provider.

If your organization does not own their own vessels, it may be possible for you to use borrowed boats for the program. The Gowrie Group offers the opportunity for an organization to purchase borrowed boat insurance through the Burgee program. To learn more, please contact Gowrie at [burgee@gowrie.com](mailto:burgee@gowrie.com) or 800.262.8911. More information is also available at <http://www.gowrie.com/USSailingPrograms/BurgeeProgram.aspx>.

##### Safety protocols

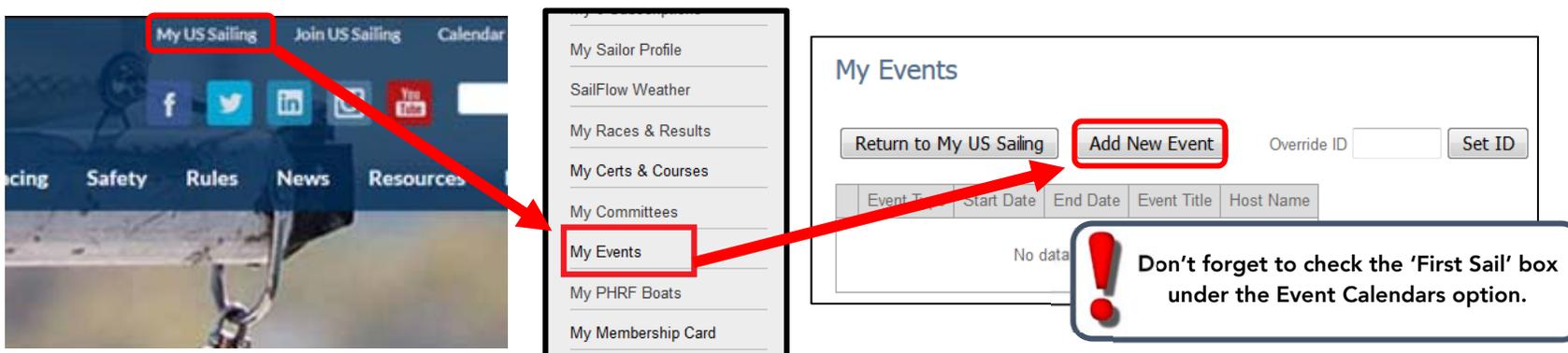
- An Emergency Action Plan is strongly encouraged for any organization running a First Sail Experience. Should you require guidance in how to develop one, please contact the US Sailing training office at [training@ussailing.org](mailto:training@ussailing.org) or 401.683.0800.
- A safety boat does not need to be on the water at the time of the Experience but there should be a working safety boat, and operator, available on shore in case of emergency.
- A recommended guideline for operating the program is between 5 and 15 knots of wind.



## Setting up Registration

We realize that not all organizations register students the same way. For that reason, we've created a Common Calendar that you can add your own registration link to. This calendar lives on FirstSail.org and is the 'go to' place for people looking to be a part of First Sail. Here's how you add your course to it:

1. **Create a First Sail course in your registration system.** A template for registration questions can be found at the end of this Guide.
2. **Go to [www.ussailing.org](http://www.ussailing.org) and log into the [MyUSSailing](#) portal.** My US Sailing is a personalized area where you can update your account information and access many useful member benefits. If you don't have a US Sailing number, please contact James Shannon at [JamesShannon@ussailing.org](mailto:JamesShannon@ussailing.org) and he can assist you in adding your course to the calendar.



The image shows a sequence of three screenshots from the MyUSSailing portal. The first screenshot shows the top navigation bar with 'My US Sailing' highlighted in a red box. A red arrow points from this box to the 'My Events' tab in the left-hand navigation menu of the second screenshot. A second red arrow points from the 'My Events' tab to the 'Add New Event' button in the third screenshot. The third screenshot shows the 'My Events' page with a table header containing 'Event Title', 'Start Date', 'End Date', 'Event Title', and 'Host Name'. A red box highlights the 'Add New Event' button. A callout box with a red exclamation mark icon contains the text: 'Don't forget to check the 'First Sail' box under the Event Calendars option.'

3. Once you're logged in to MyUSSailing, **Click on the 'Events' tab**, located on the on the left menu bar and then select **"Add New Event."** and enter in the information about your First Sail Experience, including the link to your registration. Once entered, it will show up automatically on the First Sail Calendar.



Don't have an online registration system? Take a look at Checklick, US Sailing's online registration and evaluation services partner. Checklick delivers simple, effective, resources to help you get students into your system and evaluate their progress. It also includes already branded materials for supporting the First Sail Program. **For more info contact:** Dominik Jablecki at [dominik@checklick.com](mailto:dominik@checklick.com)

## Marketing Toolkit

Once you've signed up to be a First Sail Location, you'll be given access to a marketing toolkit to help you promote your Experience, and connect with the public. Through a relationship with Prism Digital Communications, we're able to provide access to a variety of apparel and promotional materials that can be customized for your organization. Additionally, Prism offers you the ability to purchase targeted mailing lists to help promote to your target demographic- millennials.

Marketing  
Toolkit  
Examples

## Guidelines for promoting First Sail

In order to ensure consistency in the way the Experience is promoted, we ask that you add a First Sail logo to your organization's website and include the following verbiage, as listed, when describing the Experience:

*"First Sail is a nationwide initiative created in the summer of 2016 by US Sailing with support from sailing schools, community sailing centers, yacht clubs and other sailing industry organizations around the United States. The goal of First Sail is to educate the public on the benefits of sailing as a fun and exciting recreational activity and sport for people of all ages and abilities. First Sail offers a pathway to participation through resources on finding a place to learn and how to get started and be prepared.*

*The First Sail Experience offers beginners an introduction to sailing in a casual setting. The First Sail Experience is offered by our growing list of committed First Sail Centers, who are fully committed to providing a memorable experience for all participants that will motivate newcomers to take the next step."*



## First Sail Leaders

To assist you with managing the program, we've created a network of "First Sail Leaders." A First Sail Leader is a representative in the field whose goal is to help you create a first class experience for your participants- Think of them as an extra set of hands. Leaders may be current US Sailing Instructor Trainers, Regional Training Coordinators, Key Volunteers or even US Sailing staff.

While First Sail Leaders will bring a wealth of knowledge to the Experience, their role is completely land based. Leaders can assist you with things like answering questions, coordinating follow up, and helping to ensure that your customers have all the answers they need. They will not be able to attend all your events, but having them attend the first few at least will help you ensure the program goes smoothly.



## Summer Sailstice

Looking for a good "kick off" event for your First Sail Experience? Try Summer Sailstice! Founded in February 2001 by John Arndt, as the global, annual celebration of sailing held on the weekend nearest the summer solstice. The annual Summer Sailstice sailing event is free to all participants and has grown from 200 boats signed up in 2001 to almost 5,000 boats today. Since many sailors join in the fun on many different boats, the actual number of Summer Sailstice sailors participating is estimated at almost 19,000 annually.

To participate in Summer Sailstice, first set up your First Sail Experience and then register it at <http://www.summersailstice.com>. The website also provides a variety of resources and materials to help you promote the event.

## Facility preparation

Before running the program, take a look at your facility. Here are recommendations for an ideal set up:

- A classroom/meeting space that is well-lit with ventilation.
- Tables and chairs for each participant.
- Designated parking. Participants should be able to access your program quickly and easily.
- Restroom facilities.
- Dock access, or a similar arrangement that allows for students to easily access boats without transportation by powerboat. Should transportation be required to a mooring, it should only be provided by an individual who has the proper USCG license.
- Properly fitting, and US Coast Guard approved, lifejackets should be made available to all participants. The lifejacket should be clean and well maintained.
- Clear signage. Participants should be able to easily identify where the meeting point is.
- Access to water, or a water-filling station for participants, is recommended but not required.



## Instructor Guidelines

Your instructors are the face of your organization, and one of the key elements to ensuring that participants have a positive experience. To quote Bruce I. Jones from the Disney Institute, *“Spending time with customers provides organizations with opportunities to build relationships—creating new friends, or becoming “trusted advisors”.* For that reason, we strongly suggest that you discuss a few key, but simple, objectives with your instructors in advance of running a First Sail Experience. The following guidelines were adapted from a similar resource created by the National Marine Manufacturers Association (NMMA) for use in their Discover Boating program:

1. **Promote the experience, not just the sailing.** Each instructor is an ambassador for the sport, your organization, and the First Sail Experience. When they speak about what your sailing offers, ensure that they present a complete picture, both regarding your organization and the benefits of sailing as a whole.
2. **Provide an outstanding learning experience for all participants** - we want everyone to walk away very excited about boating - so much so that they can't wait to get back out on the water. The instructor's primary task is to show EACH Participant how much fun boating is and it's so easy anyone can operate a boat with a few simple skills.

3. **Ultimately, the goal is to get people sailing.** If done correctly, the experience should encourage new sailors to remain active members of your organization and for lapsed sailors to reconsider their decision to leave the sport.

**A few other specific guidelines for your Instructors should include:**

- **Foster an atmosphere of safety** - the owner/operator is responsible for the safety of passengers, crew and the vessel and has a responsibility to all others on the water.
- **Maintain a congenial but professional demeanor at all times** - Instructors must set the example particularly with respect to safety and responsibility.
- **Take personal responsibility for each participant's experience.** The complete satisfaction and enjoyment of each participant is the instructor's goal.
- **Provide a quality learning experience with the maximum fun factor.** Adjust your teaching approach to each individual not vice versa. Emphasize fun and enjoyment and if they learn a few skills along the way so much the better.
- **Maximize hands on participation** - Keep all participants engaged especially when they are awaiting their turn at the helm
- **Maximize participant helm time.** Instructors should limit their time at the helm to a simple demonstration of a skill or technique and let participants discover by doing rather than watching.
- **Maintain event schedule awareness** - Where time allows, sessions may be extended as possible
- **Hold a pre-departure Safety briefing** - You set the example:
  - Emphasize caution (re: vessel movement, hand holds and where not to stand, sit etc.)
  - Location and use of all required USCG Safety equipment
  - Correct fitting of PFD - Instructors and participants must wear PFDs while onboard and underway.
  - Line handling and equipment safety
  - Fenders and fending off - no body parts
  - Check vessels out daily before class except where pre-departure check is part of the curriculum
  - Have a docking plan - discuss and demonstrate formulating a departure and docking plan and need for thorough communication with crew
  - Look presentable- collared shirt, close toed shoes, etc.



While there is not a formal instructor training program for First Sail, we do encourage you to work with your staff to ensure that they're ready to teach the program. To encourage programs to utilize US Sailing's Instructor Training programs we offer a \$50 credit off registration in any Level 1, or Basic Keelboat course, to one (1) individual from an organization participating in the First Sail Experience.

## First Sail Experience Description

*Here's an overview of the Experience that provides participants with an idea of what to expect.*

**Overview:** An introduction to sailing with a focus on understanding terminology and concepts.

**Course length:** 2 hours

**Prerequisite:** None!

**Cost:** \$50.00 per person

Participants are automatically enrolled in the "preview" version of *Basic Keelboat Online*, which includes chapter 1 in the online learning platform. Additionally, participants receive a First Sail Guide, which provides a basic positional guide and also some specific content from US Sailing's *Basic Keelboat* book. Both enrollment in the course and the Handbook will be provided seamlessly when the register at [www.firstsail.org](http://www.firstsail.org).

### Topics covered in the Basic Keelboat Online preview course:

1. The parts of a boat;
2. The parts of a sail;
3. How a sail works;
4. What it means to trim a sail; and
5. The different points of sail

### Topics covered in on-water session:

1. Sail controls and basic sail trim
2. Slowing the boat under control
3. Raising and lowering sails
4. Overview of departing & returning to the dock
5. Line handling safety including halyards and sheets & winches
6. Tacking & Jibing including boom control
7. Team building - tacking & jibing

At the conclusion of the course, participants will receive a certificate of participation and information on how to continue their sailing experience.



## First Sail Experience Outline & Lesson Plan

*These serve as a template for you to help run the Experience. Instructors should adjust content and schedule to fit the needs of their environment and students.*

### Review:

Start by reviewing terminology and concepts. These will have been covered in *Basic Keelboat Online* so this segment will serve as a refresher, not an introduction, of the topics. Have the boat already at the dock/launching location to minimize “down” time. Ideally, you can do your initial review at the docks.

### Rig:

When the crew is ready, and the boat is pointed into the wind, hoist the main with one participant on the halyard and another participant “jumping” the halyard by the mast. A third participant should be ready on the main winch with a winch handle when the sail can no longer be hoisted by hand and tensioning as directed. Assign a person to handle the main sheet. Remember to ensure that winch handles get properly stowed in their “pockets” on deck.

### Go Sailing:

- Fall off on a tack and sail for a while, then demonstrate the procedure for tacking with mainsail only. Come about and prepare to lower the mainsail.
- Have a participant bring up a jib from below that is appropriate for the day’s weather conditions.
- Leave the jib ready to hoist, but secured to the deck with sail ties.
- Have someone bring up the jib sheets and begin to rig them. This may require instruction.
- Have participants unfurl the jib from its bag. Stow the jib cover/bag below and take the head to the forestay.
- Have someone loose the jib halyard and bring it to the head of the sail. Demonstrate how to attach and then place the jib in the feeder and forestay for hoisting. Show where the jib tack will be secured to the deck and how a person will be assigned to help guide the jib up as it is being hoisted by the jib halyard.
- Practice a hoist and douse if the wind speed and direction allow it.
- Hoist up the jib with the same routine with one exception. Have the helmsperson steer the boat about 30-45 degrees off the wind to reduce the risk of a flogging jib clew or sheet hurting the crew jumping the halyard.
- (Often your boat will be equipped with a roller furling headsail. Be sure to review how to safely and properly furl and unfurl the sail, properly managing the furling line and sheet against one another.)
- Fall off on a tack and have assigned participants pull in the jib with a couple of turns on the winch, with another standing by with a winch handle. Tell them when to stop and why (explain jib tell tales). If there are “line pockets” on the boat, have participants coil up the bitter ends of their sheets and place in pockets. Explain WHY (for safety reasons - not underfoot, avoiding tripping and make sure line is free to run without kinks when tacking).
- Explain what telltales are and what function they serve. Provide a brief discussion of the Windex and the difference between true and apparent wind.
- Explain what’s going to happen when the boat “tacks” and what the sail trimmers are going to do as the boat comes about. (There also may be backstays or check stays as an operation if so on the volunteered boat) Have a person on the bow to help guide the jib around.
- Tack the boat several times. Rotate people as trimmers until it’s a relatively smooth operation and everybody knows how to “let go” the sheet at the proper time and the sheeting in becomes timely.

### Explain jibing and what the trimmers will be doing during the maneuver:

- Slowly jibe the boat several times, rotating people in the different trimming positions.
- Practice coming about & jibing as time permits.
- Prepare to douse the jib, stowing it securely to the deck in preparation for docking.
- Prepare to douse the main sail. Assign a person to open halyard lock or off cleat when directed and make sure there is a coil of the main halyard around the winch before releasing the jib lock on the halyard. As the boat heads into the wind and slows down, lower the main slowly until it is completely down.

### Docking

- As the boat gets near the dock have participants get the fenders and dock lines. Have them properly secure the fenders on the life lines. Have a dock line secured around the boat's cleat at the bow and the stern and be ready with a coil of their line to toss to someone on the dock. Another participant can be ready with the spring lines at the amidships of the boat.
- Instruct the group when situation permits on how to "flake" the main on the boom (or roll it if that's what the boat does) and refasten the sail ties. Replace the sail cover and properly secure it.
- After the boat is docked, secured and cleaned up, exit the boat in to the classroom for refreshments and snacks as you open up for questions and comments.



**OBJECTIVES/GOALS:**

1. Rigging the boat with main/jib and leaving the dock
2. Execute tacking maneuvers
3. Returning to the dock

**MATERIALS:**

Whiteboard, Markers, Cue Cards

**CONTENT REVIEW:**

Nomenclature, , Positions on boat

TIME	ACTIVITY	METHOD
20 min	Introduction and review terminology and concepts	On boat
15 min	Rig Boat. As this is an introductory sail, having the boat partially rigged will help expedite the process and ensure maximum time on the water. : <ul style="list-style-type: none"><li>• Assign roles for initial sail</li><li>• Discuss different sail plans</li><li>• Focus on techniques for faster rigging/de-rigging (i.e. jumping)</li></ul>	
60 min	Upwind Sailing: <ul style="list-style-type: none"><li>• Practice exchanging of jibs</li><li>• Practice tacking- focus on teamwork elements</li><li>• Work on sailing "In the groove" and utilizing tell talks</li><li>• Explain Windex</li><li>• Rotate crew positions</li></ul>	
15 min	Dock/De-Rig: <ul style="list-style-type: none"><li>• Review proper tie up and storage techniques.</li><li>• Practice coiling</li></ul>	
10 min	Review /Closure <ul style="list-style-type: none"><li>• Identify next steps</li></ul>	

Once people have completed the First Sail Course, the goal is to keep them engaged. There are a variety of ways to do this: US Sailing offers a network of Accredited Keelboat Schools which can issue student level certifications. These certifications serve as perfect “next steps” for your First Sail Experience participants. If your organization meets the criteria to be a First Sail Location, you might too! Information about accreditation is available here: <http://www.sailingcertification.net/ourschools/accreditation>.

If becoming an Accredited School is a little more than you’re interested in at this point, start simple. Inviting participants to join you at a social events, including them in your marketing and communications channels, or offering them access to your other, current, educational offerings, are all good ways to keep them engaged. If you think that they might not be ready for a full class, you can create some “next steps” courses to help bridge the gap. Here are some examples of “Next Steps” Experiences that you might want to consider offering:



#### Crew Fundamentals

**Overview:** This course focuses on providing skills so that allow you to move from being a passenger to an active member of the crew. It provides a review of key terminology and offers a more focused

**Recommended Price:** \$100.00 per person

**Course length:** 3 hours

#### Introduction to Navigation

**Overview:** This course focuses on the seamanship side of sailing, with the majority of time dedicated to utilizing the resources available to you, such as a compass, to sail to your desired destination.

**Recommended Price:** \$100.00 per person

**Course length:** 3 hours

#### Performance Sailing

**Overview:** This course focuses on the competitive side of the sport including the basics of how sailboat racing works and what you need to know to participate rather than just watch.

**Recommended Price:** \$100.00 per person

**Course length:** 3 hours