

# M e m o r a n d u m

To: Paul Ulibarri, Chair  
CYA Race Management Committee

Date: October 18, 2004

**Added material: Nov 18 2004**

From: John R. Culter  
Re: CYA Level 3 and 4 Program

Note: the comments in italics are from Pat Lymburner, CYA Race Officials committee chair, which I received November 18, 2004. (The delay was technical email stuff—Pat replied immediately)

You have asked me to provide some suggestions as to how we might revitalize the CYA race management program, giving consideration to training, certification and delivery issues. Here are some thoughts:

## ***Introduction***

There are a number of gaps in the existing CYA race management program. There is no clear coordination between the efforts of the Provincial Sailing Associations (PSAs) and the needs and requirements of the CYA. We have no present means of filling in the space between club level training and the vision that ISAF brings to its world events. Yet the CYA is charged with certification of race officers beyond the provincial level, and nominating candidates to ISAF for IRO status.

*There is a misconception that the CYA is ONLY responsible for certification beyond Level 2. In fact, they are responsible for setting the standards for all levels and for administering them. They have given over to the PSA's the responsibility for administering and certifying Levels 1 and 2 but standards and the certification of Course Conductors still rests with the CYA Race Management Committee.*

There are a number of policy questions that need answering before a program can move forward. It is proposed that these be dealt with at two joint meetings of the CYA race management committee and race management reps from the PSAs, in November 2004 and the spring of 2005.

*It would be well to know what policy decisions have to be made. Specifically, what are the changes contemplated?*

Appropriate course content should be developed in the winter of 2005 for approval at the CYA spring meeting. Decisions need to be taken around how the material is to be delivered and by whom.

Finally, there are budget issues around cost for the proposed meetings and course materials and resources needed by a new training program.

## ***My understanding of the situation***

1. Race management training in Canada is delivered by the PSAs and the Canadian Yachting Association. There are four levels of training and certification:
  - RM1 member of a club race committee
  - RM2 leader of a club race committee
  - CRO race officer for provincial or regional events

SCRO race officer for national and international events

The first two levels are delivered by the PSAs; the CRO and SCRO levels are certified by the CYA.

*It is generally held that a CRO should be capable of being a Course Race Officer, under the guidance of a Principal Race Officer, at national and international events.*

2. The CYA has published a formal Race Management Manual, which may be used by the PSAs in their local training. The author describes the manual as a reference document, rather than a training guide. There may be other CYA teaching resources available, and some of the PSAs have developed their own material.
3. Delivery of the RM1 and RM2 content by the PSAs may not be uniform, since each provincial body creates its own course requirements and certification process. As well, since there is no agreed body of knowledge used by the PSAs in their training, there may be regional differences in race management practice. There are also differences in levels of practical experience required by various PSAs before certification is granted.

*At the APC last year it was agreed by all the PSAs that the BC and Ontario materials were so similar that they could be the standards that everyone will use for Levels 1 and 2. Ross Cameron was to produce an amalgam of the two programs that would be distributed but it has not been completed. That was what the Race Officials Committee and the Racing Division approved.*

4. Certification by CYA is done on receipt of a completed application with peer recommendations and details of the applicant's experience. At present, we do not have an objective standard for certification, which means that the certification committee must use its best judgment to determine whether the applicant has the necessary knowledge, experience and attitude.

*I believe that the current model for certification relies heavily on references selected by the certifying officials from those supplied by the applicant. The certifying officials are not limited to that scope and can go as far as they like in seeking to determine the applicants suitability.*

5. At present, application to the CYA is done outside of the PSA structure. There is no endorsement process; individuals apply directly and they might not be certified at the provincial level. Some PSAs object to this practice, feeling that candidates should be referred through the PSA structure, others are concerned about subjective judgments by PSAs holding qualified candidates back.

*This is absolutely true. It is imperative that a sense of objectivity be applied to the certification process. One only has to look at the mess we were in two years ago to appreciate how much work the Committee has put into correcting the process to date. Having or allowing the PSAs to be the arbiters of who can apply will cut the process off at the knees. The current model is far more fair in that no one knows who the certifying officials will be until the application is received by the Chair. The Chair should be assigning three officials to each application on a turnabout basis so that there is little subjectivity introduced into the process.*

6. Training is delivered by 'Course Conductors', at present certified by CYA or individual provinces. There is no guarantee that course content at the PSA level will be delivered by a CYA certified instructor.

*The CYA Race Management Committee is the sole certification body for Course Conductors.*

7. Finally, in an effort to see what others are doing, you have invited a US Sailing representative to present the US program to a group of race management people at the November meeting. We understand this will be an opportunity to negotiate for the use of parts of the US program for our purposes.

**Issues to consider**

1. Most would agree that, in our sport, ISAF has led the way to innovation in race management in recent years. The strong movement in ISAF toward supervision of world championships in the Olympic classes, the Olympic Regatta itself, and finally its control over the rule book have placed ISAF at the centre of creativity and development of good practice. For the CYA, it seems important that we provide a bridge between the ISAF world standard and the needs of local yacht clubs, as represented by the PSAs.

In other words, our proposed CYA program should be the transition stage between local club racing and the ISAF standard. This implies additional learning, as well as certification.

*That is why the CYA Race Management Committee is responsible for the entire certification and training process. The PSAs should be administering the CYA approved program. It is hoped that the CYA would align its practices closely with ISAF so that there was consistency in the overall process*

2. CYA programs are delivered by PSAs. While some might wish to imagine a single RM program for all of Canada, the needs of individual clubs, and individual provinces, will necessarily drive the program. We have tremendous variation in climate and sailing conditions across the country. Some provinces sail 12 months a year, others have a more restricted season. Some provinces are on tidewater; others operate on lakes. Whatever content is going to be delivered in the provinces, it will have to be appropriate for that PSA and its needs.

On the other hand, when individuals present themselves for CYA certification, they should be at a suitable level in terms of knowledge and experience. They may not share the exact same background, but they should know enough to be able to absorb whatever new ideas and concepts a CYA training course will provide.

Accordingly, it seems that it would be good to agree on a national set of standards—the body of knowledge that we expect candidate CROs and maybe SCROs to have. This would include the basics of regatta preparation, course setting, starting line control, on-course management and some other things. This would allow a CYA program to bring interested individuals into the more formal environment of major regattas, with all the care and attention required to operate at a regional or national level.

*Although I dont think I understand all of this point, I would suggest that all of the*

*programs need to address the teaching of the individual in Race Management techniques so that everyone knows what to expect from each certified official simply by knowing what level they have achieved. We don't need to expand the PSA's role beyond the need for Level 1 and Level 2 officials but even they should be uniform across the country. The exceptions are those who are Level 2 with Level 4 knowledge and ability but who are so frustrated with the perception of unfairness that they do not want to apply to go any further.*

3. Some decisions should be made around delivery of CYA course material. Should candidates present themselves at a designated regatta for training, where we can match an on-the-water experience with some formal instruction? Or should our expectation be that the material is delivered directly to PSA race offices, perhaps over the web? Other possibilities exist—the main question is whether the CYA content is to include supervised time on the water or whether it will be classroom oriented.

*This is one of the issues that US Sailing has been struggling with and it will be interesting to get their take on the process.*

4. As noted above, the provincial and national systems are not always closely linked. There is no required transition from PSA programs to the CRO level. Should this continue? Are there advantages to more closely engaging the PSA programs and creating an expectation that well-proven ROs will be nominated by their PSAs.?

*In a prior point I raised the notion that the PSAs ADMINISTER the CYA program*

5. Another question around transition levels: Have we enough qualified CROs and SCROs already certified to meet our needs? How many CROs and SCROs are required for Canada to maintain its national and regional regattas? Or is the move to national status a stage in the continuing development of race officers, which might benefit the country as a whole?

It would be reasonable to imagine that CYA training would be of value to provincial race officers whether they run regional or national regattas or just local club events. Or, we could argue that a limited number of CYA certifications would make it easier to maintain a standard, especially if some less-competent people were weeded out of the program over time.

*Does this proposal anticipate that we are going to limit the number of national race officers so that there will be only enough for the known events? Are we then going to train Level 2 RO's to the level of a 4 but not certify them until somebody dies, retires or is ruled incompetent?*

6. Whatever the means of delivery, we have to consider questions of cost. For any individual moving through the system, what costs should be born by CYA, by the sponsoring PSA (if any) and by the individual her/himself? I expect CYA staff can provide some answers to these questions, based on previous models. It would be wise, I suspect, not to expect individuals to bear the whole cost of training and certification.

*The gist of this point seems to be that the PSA is "sponsoring" the individual at the national level. In my humble view that is not the case and it is up to the individual to*

*want to pursue it. If that goal happens to be concurrent with the PSAs need then so be it.*

7. We also need to ask ourselves who we want to deliver our course content. Are we looking at a national team of traveling instructors? How would such people be selected? Obviously they would need to have the confidence of the race management committee, the PSA leadership in the provinces and the major clubs. Instructors at this level need more than competency—they need to deliver good, strong classroom instruction that will energize and motivate individuals who are already competent, and interested in expanding their knowledge and maybe certification.

*This will likely be the case. It would be awesome if we could "piggy back" these courses onto major sailing events and bring candidates in for "mentoring" as well as taking a course. Shadowing the PRO through the entire setup of the event for example can be an excellent teaching method.*

#### **Next steps**

There are two tasks before us: to develop answers to the foregoing policy issues that are satisfactory to the CYA and the various PSAs; and to create course content that will serve to bridge the gap between the knowledge base provided by PSAs in the RM1 and RM2 programs and the standards of practice used by ISAF in its world and Olympic regattas.

For the policy questions, I propose that we ensure as many as possible PSA race management training chairs attend the November 2004 CYA meeting. I would plan a joint discussion with the CYA race management committee and whatever more CYA staff and senior officials need to be included. Given the published schedule, it appears this meeting should take place coincident with the announced seminar set down for November 24 - 25.

*It is now scheduled for the a.m. of the Friday but could take place on Thursday after the US Sailing presentation is over. It is also possible to have an RMC meeting on the Wednesday evening after the days presentation.*

It would be important, however, to make sure the program is primarily focused around the issues presented here, and that the PSA reps and the CYA committee are the main players. Reps should come representing their PSA, and should have authority to make decisions. Obviously observers are welcome, but the issues at hand are complex, and solutions will take most of the available time.

Ideally the CYA race management committee and the PSA reps could reach agreement on most policy issues; to the extent that further discussion is needed, one or more conference calls over the winter might do the trick. Our target would be to come into the spring CYA meeting with a series of policy recommendations that the executive could adopt.

Dealing with the idea of an agreed body of knowledge, we would want to invite the PSA reps attending in November to bring complete details of their RM1 and RM2 course materials, an explanation of their certification processes, and whatever ideas they may have about what they think should be included in a CYA CRO program. It would be good if the PSA material could be circulated in advance, but this could be a tall order given the available time.

*Please review my earlier point that the agreement with the PSAs at last years APC was that the*

*amalgam of the Ontario and BC materials would be the Level 1-2 standard across the country. There was some questions around splitting the courses into two or combining them and it was decided that either option was available at the discretion of the PSA.*

For the CYA course content discussion, a number of resources are in front of us: material from recent ISAF courses in Canada and the US; the planned November 2004 review of the US Sailing program, and the resources made available by PSAs.

*I assume that this is for Level 3 and 4*

Over the winter I would offer to draft some CRO course material based on the resources noted above. This would be teaching materials and course notes, not reference material as provided in the CYA manual. I understand the author of the current manual plans an update for January/February, and that will be a useful addition to the program.

The material will be circulated to the CYA committee and PSAs in February/March, and reviewed by conference call. The same group should meet formally at the spring meeting to finalize details and clean up remaining policy issues.

**Funding requirements**

Leaving aside the ongoing issue of individual training and certification costs, the proposed reorganization of the CYA race management program will incur costs of two kinds: meetings in November and April of the CYA committee and reps from PSAs, and production costs for teaching aids and resource materials.

Meeting costs are probably best provided by CYA staff, but might look something like this. Please note numbers of people are quick guesses, as I suspect not all PSAs will send race management delegates.

Toronto meeting in November 2004		
CYA race management committee members	5	
PSA race management chairs	<u>7</u>	12 people
Air fare average at \$350 each	\$4,200	
Hotel at \$75 each	<u>900</u>	say \$5,000
Spring 2005 meeting		\$5,000
Conference calls		\$500
Copying and printing		\$500

I have no clear idea of where we might go with teaching materials and resources. If there is budget to do things on CD and video, we should use those technologies. Otherwise we can go with paper and Powerpoint presentations. A starting budget of \$2,500 should suffice.

It might be possible to get some contribution from the PSAs for this work, but given the short notice, that could be difficult.

**Conclusion**

There may be some shortcuts to this suggested outline, and I would welcome your comments and suggestions. This is a very quick look at the tasks before us, and quite likely some important considerations have been left out.

I look forward to hearing from you.

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