



NCBA COURSES



Notes for Trainers

NCBA Boat Courses

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Introduction 2022

This is a review of the original document which was published in 2017. Since that time we have developed several add-on items and other specific courses. These have been included in this document.

Message from the Director of Training 2017

Initially, this process began as a look at the Certificate in Community Boat Management (CCBM) and to revise this into a more user-friendly document. As this neared completion, it was decided to ensure there was a standardisation of format by including both the Community Crew Certificate (CCC) and the Boat Handling Course (BHC) in this document.

Whilst there has been very little change in the content of this handbook from the actual syllabi there has been considerable thought put into its compilation. Putting the three awards into the same format and document appeared the best way forward.

The document is primarily aimed at Trainers and is designed to inform them of the standard and competence levels that should be achieved to obtain the awards. It is recognised that not everything may be able to be covered practically as certain features e.g. tunnels or locks may not be reasonably reached during the course. However, these should be covered in theory at least and this is catered for in the CCBM Assessment Sheet in Appendix 1. Whilst this assessment sheet specifically relates to the CCBM, others will be available for the CCC and BHC as further appendices.

This handbook is about “what” should be taught and assessed, the “how” is up to the Trainers and their situation. There are many different ways that a subject may be taught but from the NCBA point of view, the essential factor is that the end product must reflect the competence level that is required.

This is the first of two documents the second being a review and reorganisation of the current course notes into Trainer’s Notes, which will provide useful information and methodology that a Trainer may wish to adopt.

Although this is primarily aimed at Trainers there is no reason why it should not be available for candidates so that they are made aware of the standard required to obtain the award(s).

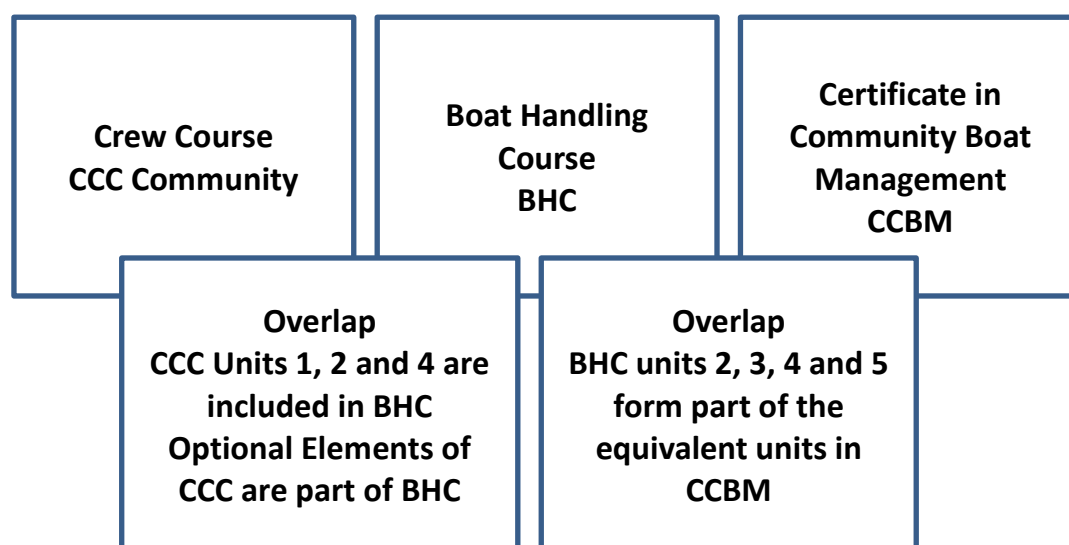
The document is available for immediate use and whilst the role of the sub-committee that reviewed and then compiled it may be finished there will be continuous monitoring of the content to ensure that everything is up to date.

Derek Stansfield
NCBA Director of Training 2017

INTRODUCTION

The main suite of NCBA of Training and Assessment qualifications and courses remains the same. Since 2017 we have added several additional modules.

The main set starts with the Community Crew Course (CCC) which enables a person to act as crew on a community boat, through to the Boat Handling Course (BHC), which enables a person to take out a private boat or helm a community boat under the supervision of a qualified skipper. The final qualification is that of a Certificate in Community Boat Management (CCBM), which is recognised by the Maritime Coastguard Agency (MCA) as a qualification to skipper/captain a boat of up to 12 passengers on Category A or B waters.



The NCBA suite of courses is managed and delivered by an Accredited Training Centre. They are delivered by, or under the supervision of their ATC trainers. The trainers themselves have been assessed through a Trainers course run directly by the NCBA itself. The ATCs are supported and visited by a Senior Trainer to ensure that the standards of the NCBA and the requirements of the MCA are being met.

This Training Manual has been developed to provide further support for both ATCs and their Trainers in maintaining these standards. Whilst it is primarily aimed at Trainers it may also be helpful to both candidates and others who are considering taking one or more of the NCBA awards.

As will be seen there may be some overlap between courses and this manual has been designed so that all the content for one course is in place. All the course sections are annotated the same for each course and the Course Notes have been annotated to reflect the sections that they refer to.

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Community Crew Course

The Community Crew Course

This course offers the candidate the skills and knowledge to act as part of the crew on a community boat. The crew become the extra eyes, ears and hands of the captain. Passengers appreciate the crew's skills, which help them to have a safe and enjoyable time. The candidates also need to have a safe and enjoyable time.

The course is for people who are 8 years old and over. No previous experience is required. It is a way for people to begin to enjoy canals and to build both boating and life skills. The course takes place on a boat meeting the NCBA standards for training. It takes at least 20 hours and no longer than 12 months. It is tutored by someone who holds CCBM under the supervision of an NCBA Trainer, who verifies the course.



Community Crew Course

Using this document

The document itself plus:

- Other documents such as the Health & Safety Executive (HSE) booklet 'Five Step Risk Assessment' provides useful supplementary material.
- Notes have often been written by ATCs or trainers themselves, to suit the particular needs of the course in question.
- 'The Boaters Handbook' published by the Canal and River Trust

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Community Crew Course

Community Crew Course

Unit 1: Preparation and Taking over a boat

Aim: that the candidate will be able to:

- Know the good practice expected from them by MCA, CRT and EA
- Carry out the tasks needed to prepare a boat for a trip and to close it down afterwards
- Use written risk assessments adjusting them in light of actual circumstances
- Deal with health, safety and environmental issues, including communicating with the captain, other crew members, passengers and the public.

This unit is about what to do before any passengers arrive.

1.1 Read and be familiar with The Boaters Handbook

- The Boaters Handbook is published by the Canal & River Trust with Environment Agency. As of 2022, the latest edition is dated “Summer 2014”. This is best done before the candidate joins the course.

1.2 Open up the boat before the arrival of the group

- Understand that bottled gas on boats is heavier than air and will sink to the bottom of the boat, when mixed with air it can be explosive.
- Check for gas, and open doors and windows to ventilate the boat. See section 2.3 below
- Check the boat inventory and report faults.
- Check all light switches and bulbs
- Check sink and toilets
- Put out external equipment in suitable places
- Check bilges
- Turn on the gas and electrical supplies safely
- Locate where the fuel isolation switches are.

1.3 Prepare the boat for a specific type of group

- Set up and check that any special equipment such as ramps and lifts work properly
- Check that personal buoyancy aids are serviceable and the right number is available
- Be able to take off and store any equipment the captain tells you is not required for the trip
- Confirm policy for use of any personal buoyancy aids.

Community Crew Course

1.4 Assist captain to provision boat

- Be able to switch between gas cylinders, and know about the different types available. Help to replace a cylinder
- Dip the diesel tank to determine the need for refilling. Alternative methods may also be used such as engine hour logs compared with a known rate of fuel usage
- Fill drinking water tanks when required
- Check the toilet tank is not full, and replace toilet rolls and bin liners
- Check and deal with other domestic items e.g. cleaning materials, litter
- Check fire extinguishers in date, correct pressure, and note visibly damaged or missing equipment.
- Check fire blanket
- Explain how and when to use extinguishers and blanket
- Explain where gas is likely to be in the boat and how fires may start from escaped gas.

1.5 Closing down the boat

- Help to moor the boat for long-term security
- Carry out listed checks before leaving the boat including checking the bilge and tightening the stern gland
- Understand the need for proper ventilation
- Understand the need to remove perishables
- Move all loose equipment into the boat
- Check and clean all surfaces, cupboards, bunks and appliances
- Check toilets: help empty/with pump-out
- Turn off electricity and gas
- Lock up the boat on the captain's instruction.

1.6 Optional Parts

- If the boat has no gas, describe how to check for it on a boat with it
- If there is no checklist or only a very short one, make a comprehensive list of the checks needed
- If the stern gland is greased automatically describe how a manual greaser works.

Community Crew Course

Unit 2: Health, safety and environment

Aim: that the candidate will be able to:

- Use written risk assessments adjusting them in light of actual circumstances
- Communicate appropriately about health, safety and environmental matters with the captain, other crew members, passengers and the public.

This unit is about helping candidates to see that trips are made safely and without harm to health or the environment.

2.1 Be familiar with a standard risk assessment

Using passing through a lock as an example

- Explain how each item helps you work a lock more safely
- Explain how you use the standard assessment
- Acting on the items that matter whilst discarding those that do not
- Adding actions for risks special to a particular lock.

2.2 Show how to use the boat manuals to help you operate the boat safely

2.3 Check the warning instruments that are usually on boats

- Gas detector, carbon monoxide detector, smoke detector
- How to respond to their warnings.

2.4 Show how to prevent diesel or oil spillage

- Knowing how to pour from a fuel can. Tipping to allow air into the can, using a funnel and placing a rag around the filler when pouring oil or diesel
- Checking the oiliness of bilge water before you start pumping.

Community Crew Course

2.5 If diesel or oil is spilt know what to do

- Tell the captain at once, giving as good an estimate as possible of the quantity spilt
- Limit spillage by:
 - Stopping the cause
 - Mopping up
 - Damming off
 - Spreading earth or sand
 - If told by the captain use detergent to disperse oil, clean decks etc.

2.6 Show practical care for the environment

- Shut the gates behind you
- Keep to footpaths
- Don't light fires
- Respect wildlife
- Take litter away with you
- Do not pollute the water in any way.

2.7 Explain how communication is listening, telling and understanding

- Be polite – even when dealing with difficult people
- Know how to accept instructions from the captain and senior crew
- Know how to check that communication has been understood
- Know to check they understand how much of their initiative they can use.
- Observe common body language to see what's meant beyond what's said
- Listen, observe and report accurately to the captain when appropriate

Community Crew Course

Unit 3: Group arrangements

Aim: that the candidate will be able to:

- Know their role and the roles of other people on board
- Be able to show factual knowledge of the different sorts of groups using the community boat
- Act as crew working with passengers.

This unit is about looking after the people involved.

3.1 Crew and passenger management

- Be able to show understanding of the roles and responsibilities of the captain, crew, carers and passengers.

3.2 Knowledge of user groups

- Discuss problems, including access and safety matters, before the group arrives
- Describe the ways help may be given to different types of passengers
- Show how they do this on the boat they normally use (where possible).

3.3 Practical

The candidate should be able to:

- Give instructions to people getting on and off the boat
- Be able to operate the toilet on the boat
- Explain the rules about radios, alcohol, smoking and personal buoyancy aids
- Use personal buoyancy aids when required
- Communicate using hand signals
- Keep a lookout ahead and know why it is needed.

3.4 Communication

- The candidate should be able to show they can use what has been learnt in section 2.7 by giving a safety talk and explaining to passengers where they may and may not go on the boat.

Community Crew Course

3.5 Optional Parts

- Operate a passenger lift if fitted
- Show how to light a gas cooker and explain its safe use
- Help disabled people:
 - Find out what help is required by asking them first
 - Knowing when to help and when not to help

Unit 4: Practical boat handling.

Aim: that the candidate will be able to:

- Steer a boat along the canal
- Put the boat into the side and moor up
- Act as bowman
- Help with locks.

This unit is about working the boat.

4.1 Use of ropes

- Coiling and throwing a rope
- Tying simple knots and their uses, including Tugman's or Canalman's hitch, round turn and two half hitches with and without the quick release variation
- Bringing a rope back to the boat for increased safety and security
- Securing a rope to a tee stud, bollard, ring or spikes
- Use of fore and stern ropes
- Safe stowage of ropes.

4.2 Steering

- Show how the boat responds to tiller movements
- Show how to start, stop and control the throttle on the engine and gearbox
- Steer the boat along a length of waterway including one or two bends

4.3 Bringing the boat to the side of the waterway

- Choose and steer the boat to a suitable point on the side
- Tie up safely using what they have learnt in section 4.1 on ropes
- Arrange ropes allowing for wind, current, and rise and fall of water.

Community Crew Course

4.4 Travelling through a Lock

Explain on the lock side, how to work the lock

- Practical risk assessment – show the use of what was learnt in section 2.1
- Explain how to get ashore safely
- Show courtesy to other users - sections 2.6 & 2.7 in practice
- Show how to use ropes in the lock if they are required
- Types of paddle gear for both ground and gate paddles, their safe usage - winding down rather than letting them drop. Anti-vandal locks
- Using a windlass safely
- Make sure all paddles are correctly set before starting
- How to leave gates and paddles when leaving a lock.
- Getting back on board
- Know what to do in the following emergencies:
 - Hanging up on cill or ropes
 - Flooding from gate paddles
 - Windlass off spindle
 - Someone falling in.

4.5 Optional Parts

- Steering
 - Be able to turn a boat in the way used locally
 - Be able to take a boat up and down through a lock.
- Equipment
 - Rig, lower and raise an anchor safely.
- Ropes
 - Throwing a rope over a bollard
 - Make extra knots and describe their uses: e.g. bowline, clove hitch, reef knot, sheet bend
 - Use of springs to position a boat.

Community Crew Course

Unit 5: Boat handling: theory

Aim: that the candidate will be able to use what they have learnt in practice to:

- Develop more boating skills on the same boat
- Use the skills they have to learn to work on other boats.

This unit is about being able to take responsible roles in difficult conditions.

5.1 Boat handling

Remembering what was done in practice in section 4.2:

- Explain, with a model or diagrams, how a boat responds to the tiller
- Show how to move the tiller to bring the boat to the shore.

5.2 Locks

Remembering what the candidate did in practise in section 4.4

- Describe how a boat moves up through a lock to a higher level
- Describe how a boat moves down through a lock to a lower level
- Explain the differences between ground and gate paddles and how each is used.

5.3 Optional Parts

Knowledge of local routes

- Show what the signs on the map are for a turning point, water, pump out and mileage
- Boarding points for wheelchair users
- Show how to follow the route the boat takes on the waterway map
- Identify facilities such as shops, launderettes and telephone boxes on the map.

Community Crew Course

Unit 6: Practical boat handling 2

Aim: the candidate will be able to

- Know what to do in an emergency.

This unit is about being able to control the boat in difficult conditions.

6.1 Describe three situations when the boat may need to be evacuated

In each situation describe

- How instructions may be covered in the introductory talk
- The sequence of actions that should be followed by key individuals
- What action should be followed once the evacuation has been completed?

6.2 Evacuate the boat under the captain's supervision

- Carry out a practical exercise of one of the scenarios described in 6.1 under the captain's supervision.

6.3 Explain and demonstrate the uses of personal buoyancy aids

- When they must be used and when they may be used
- Circumstances or situations when they shouldn't or may not be used
- Demonstrate how the buoyancy aid on the boat should be put on.

6.4 Using what has been learnt in unit 3.1

- Act as bowman, watcher and rescuer during recovery from the boat of someone who has fallen overboard

Community Crew Course

6.5 Show how to rescue someone in the water from the shore

- Use of the buoyancy ring and throw line
- Show how to bring someone in the water back to safety.

6.6 Be able to use the equipment on board for emergency communication

- Use of an apparatus to call emergency services, giving appropriate information
- Public address system to give a safety talk. If there's no system give a short talk without one.

6.7 Optional Parts

- Show they can use other communication equipment on board, such as VHF radio, loud hailer or megaphone.

Community Crew Course

Unit 7: Discussion and appraisal

Aim: that the candidate will be able to:

- Show in a test that they have learnt things well enough to be able to use them effectively
- Contribute to improvement by making useful comments about the course at the right time.

This unit is about testing and improvement, for the participants and the course itself.

7.1 Complete individual multi-choice test

7.2 Review progress

- Review progress at least at the halfway point of the course
- Reviews can be more frequent if appropriate, both as part of the group and individually.

7.3 Complete and return feedback forms

Community Crew Course

Boat Handling Course

The Boat Handling Course

This course is a way for people to learn sufficient boating skills for them to be able to take a private boat out in ordinary conditions or helm a community boat under a qualified captain.

The course is for people of 14 and over. Between 1 and 4 people are trained together. No previous experience is needed.

The course takes place on a boat approved by the trainer concerned as meeting the requirements for the course. It takes at least 20 hours of boating which may be split into shorter sessions. It is tutored by an NCBA trainer. When several short sessions are included, extra time is needed for the revision of previous sessions.



Boat Handling Course

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Boat Handling Course

Unit 1: Preparation and Taking over a Boat

Aim: that the candidate will be able to:

- Know the good practice expected from them by MCA, CRT and EA
- Carry out the tasks needed to prepare a boat for a trip and to close it down afterwards
- Use written risk assessments adjusting them in light of actual circumstances
- Deal with health, safety and environmental issues, including communicating with the captain, other crew members, passengers and the public.

This unit is about what to do before any passengers arrive.

1.1 Read and be familiar with The Boaters Handbook

- Published by the Canal & River Trust with Environment Agency. In 2022 the latest edition is dated 'Summer 2022'. This should be done before the candidate joins the course.

1.2 Open up the boat before the arrival of the group

- Consider that bottled gas is heavier than air and will sink to the bottom of the boat. Also, when mixed with air it can be explosive.
- Check for gas, and open doors and windows to ventilate the boat. See section 2.3 below
- Check the boat inventory and report faults.
- Check all light switches and bulbs
- Check sink and toilets
- Put out external equipment in suitable places
- Check bilges for water
- Turn on the gas and electrical supplies safely
- Locate where the fuel isolation switches are.

1.3 Prepare the boat for a specific type of group

- Set up and check that any special equipment such as ramps and lifts work properly
- Check that personal buoyancy aids are serviceable
- Check that the required number and sizes of personal buoyancy aids are available
- Be able to take off and store any equipment the captain tells you is not required for the trip
- Confirm policy for use of personal buoyancy aids.

Boat Handling Course

1.4 Assist the captain to provision the boat

- Be able to switch between gas cylinders, and know about the different types available. Help to replace a cylinder
- Dip the diesel tank or otherwise determine the need for refilling. This could be from a log of engine hours and a known rate of fuel usage
- Fill drinking water tanks when required
- Check toilets tank is not full, replace toilet rolls and bin liners
- Check and deal with other domestic items e.g. lack of cleaning materials, litter
- Check fire extinguishers in date, correct pressure, and note visibly damaged or missing equipment
- Check fire blanket
- Explain when and how to use extinguishers and blanket
- Explain where gas is likely to be in the boat and how fires may start from escaped gas.

1.5 Closing down the boat

- Help to moor the boat for long-term security
- Carry out listed checks before leaving the boat including checking the bilge and tightening the stern gland
- Understand the need for proper ventilation
- Understand the need to remove perishables
- Move all loose equipment into the boat
- Check and clean all surfaces, cupboards, bunks and appliances
- Check toilets, possibly and be able to help to empty or pump out the tank
- Turn off electricity and gas
- Lock up the boat on the captain's instruction.

1.6 Optional Parts

- If the boat has no gas, describe how to check for it on a boat with it and how it is usually turned on and off.
- If there is no checklist or only a very short one, make a comprehensive list of the checks needed.
- If the stern gland is greased automatically describe how a manual greaser works.

Boat Handling Course

Unit 2: Health, safety and environment

Aim: that the candidate will be able to:

- Use written risk assessments adjusting them in light of actual circumstances
- Communicate appropriately about health, safety and environmental matters with the captain, other crew members, passengers and the public.

This unit is about helping candidates to see that trips are made safely and without harm to health or the environment.

2.1 Be familiar with a standard risk assessment

Using the passing through a lock as an example

- Explain how each item helps you work a lock more safely
- Explain how you use the standard assessment
- Acting on the items that matter whilst discarding those that do not
- Adding actions for risks special to a particular lock.

2.2 Show how to use the boat manuals to help operate the boat safely

2.3 Know how to check the warning instruments that are usually on boats.

- Gas detector, carbon monoxide detector, smoke detector
- How to respond to their warnings.

2.4 Show how diesel or oil spillage can be avoided

- Knowing how to pour from a fuel can. Tipping to allow air into the can, using a funnel and placing a rag around the filler when pouring oil or diesel
- Checking the oiliness of bilge water before you start pumping.

Boat Handling Course

2.5 If diesel or oil is spilt know what to do

- Tell the captain at once, giving as good an estimate as possible of the quantity spilt
- Limit spillage by:
 - Stopping the cause
 - Mopping up
 - Damming off
 - Spreading earth or sand
 - If told by the captain, use detergent to disperse oil, clean decks etc.

2.6 Show practical care for the environment

- Shut the gates behind you
- Keep to footpaths
- Don't light fires
- Respect wildlife
- Take litter away with you
- Do not pollute the water in any way.

2.7 Explain how communication is listening, telling and understanding

- Be polite – even when dealing with difficult people
- Know how to accept instructions from the captain and senior crew
- Know how to check that communication has been understood
- Know to check they understand how much of their initiative they can use
- Observe common body language to see what's meant beyond what's said
- Listen, observe and report accurately to the captain when appropriate
- Say what they think, when it's useful to do so, and show respect for others.

Boat Handling Course

Unit 3: The engine, transmission and propeller

Aim: the candidate will know that the power system is working satisfactorily when they start it.

This unit is about the power system works.

3.1 Before the engine started

Find and be able to use the list of checks required for a particular boat. The candidate should be able to show how to check the following:

- Fuel levels and primary filter
- Bilges, looking out for blockages, oil or other contamination
- Check engine oil and water coolant/seacocks and filter, if fitted
- Slack in belts
- Stern gland greaser
- Weed hatch

3.2 Starting and stopping the engine

- Show how to start the engine
- Show how to stop the engine.

3.3 After starting checking there are no problems

- Observe gauges/lights - oil, water temperature, volt meters
- Pump bilges (if required)
- Visual inspection of the engine for loose parts
- Check forward and reverse gears engage
- Check bow thrusters working, where fitted
- Listen for unusual noises
- Observe exhaust colour, density
- Know what's normal for the engine and how to report anything that isn't normal.

3.4 Take the boat into the stream and test its responses

- Respond to the wind both when moored and in the stream so far as practicable
- Determine power settings to use on the throttle
- Side movement of stern under high forward and reverse power
- Understand the stopping distance without power
- Reversing for two boat lengths

Boat Handling Course

- Determine the position of the turning point and rate of turn at a very low speed, noting the relationship between turning and forward movement.

Unit 4: Practical boat handling and working locks

Aim: that the candidate will be able to show that they can:

- Take a boat onto and off a mooring, steer it along a canal including close confined situations and through locks
- Go through fixed and swing bridges and tunnels safely
- Turn a boat safely in both directions
- Reverse a substantial distance
- Use ropes effectively
- Free a boat that has gone aground
- Explain how the boat responds to the tiller and engine in different conditions.

This unit is about being proficient in controlling the boat in ordinary use.

4.1 Use of ropes

- Coiling and throwing a rope
- Tying simple knots and their uses, including Tugman's or Canalman's hitch, round turn and two half hitches (with and without the quick release variation), clove hitch, reef knot, bowline and sheet bend
- Bringing rope back to the boat for increased safety and security
- Securing a rope to a tee stud, a bollard, a ring or spikes
- Use of fore and stern ropes
- Safe stowage of ropes
- Springs and their uses
- Explain the use of centre rope when working the boat with a crew
- Explain how ropes can be used effectively to help in turning, stopping and reversing a boat
- Explain and show how springs are used.

4.2 Getting underway, Steering and moving along the waterway

- Show how the boat responds to tiller movements
- Steer the boat along a length of canal including bends and confined spaces
- Be able to take a boat up and down through a lock
- Be able to understand and use sound and other signals
- Understand the rules of navigation, rights of way, passing boats and other users
- Casting off and using engine controls
- Rules of the road – passing, giving way, overtaking
- On a river, the upstream boat gives way to the downstream boat
- Choosing the track, positioning the boat within the canal to enter and leave locks and bends

Boat Handling Course

- Rights of way and other users such as walkers, fishermen and cyclists
- Understand how the tiller works including how speed and direction of travel affect the boat's response
- Understand the effect of cavitation
- Understand and be aware of the effects of wind
- Understand the uses and limitations of bow thrusters

4.3 Bringing the boat to the side of the waterway and mooring

- Coming to a mooring: what the crew do, use of ropes
- Choose and steer the boat to a suitable point on the side
- Tie up safely using what has been learnt in section 4.1
- Arrange ropes allowing for wind, current, rise and fall of water
- Leaving a mooring
- Suction effect on moored boats
- Dealing with strong flows and winds.

4.4 Travelling through a Lock

- Deployment of the crew (or personnel) and explain their roles
- Explain on the lock side, how to work the lock
- Practical risk assessment – show the use of what they learnt in section 2.1
- Getting ashore safely
- Courtesy to other users - sections 2.6 & 2.7 in practice
- How to use ropes in the lock if they are required
- Types of paddle gear for both ground and gate paddles, their safe usage - winding down rather than letting them drop. Anti-vandal locks
- Using windlasses safely
- Make sure all paddles are correctly set before starting
- How to leave gates and paddles when leaving a lock.
- Getting back on board.
- Know what to do in the following emergencies:
 - Hanging up on cill or ropes
 - Flooding from gate paddles
 - Windlass off spindle
 - Someone falling in.

4.5 Fixed bridges

- Instructions to passengers and crew about the dangers of being caught between bridge structure and boat roof or sides
- Choice of track for visibility and to take the suitable arch

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- Giving way at a bridge
- Suction effects.

4.6 Swing and lift bridges

- Use of CRT key and other security devices
- Awareness of road and waterway traffic
- Operation of manual and electric bridges.
- Wedges, jacks and interlocks on swing bridges. Counterweights on lift bridges.
- Negotiating bridges - clearances, clear instructions to the crew, keeping off the roof
- Courtesy to walkers, residents, road and water traffic.

4.7 Tunnels

- Following CRT tunnel instruction boards
- Clear instructions before entering. Inside lights on. Check headlight. 'No go' areas during the passage. Keep a lookout. Keep passenger noise levels lower
- No naked lights. No flash photography or shining torches into steerer's eyes, arms and legs inside the boat
- What to do if there is an emergency - Headlight fails, fire, person overboard. Use of tunnel safety features, e.g. distance markers, fluorescent signs, rubbing boards, and chains.

4.8 Winding

- Location of winding holes
- Turning in forward gear with the nose on the bank
- Undertaking a free turn.
- Additional methods and when these should be used

4.9 Going aground

- Show how to get a boat afloat after going aground, CN5.1 provides more details.
- Use of different strategies and the sequence that these would be used in

4.10 Reversing

- Hold the boat in mid-channel using the engine
- Reverse the boat a suitable distance back along a straight. Use bow thruster if fitted, but also show or explain how to control direction by the occasional use of forward gear, with ropes or with a pole. CN4.2 provides more details.

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Unit 5: Emergencies

Aim: the candidate will be able to demonstrate the drills needed in emergencies during boating, in particular, those relating to:

- Man overboard
- Fire
- Sickness or injury
- Mechanical failure.

This unit is about explaining how to deal with emergencies.

5.1 Information

- Understand the need to have a list of people on board and emergency contacts for them and the canal and boat managers ashore
- Explain the roles of captain and crew in an emergency
- Indicate what maps and guides and arrangements are needed to find out where the boat is at any time
- Use maps and guides to locate the boat on the canal both by description and by map reference. CN3.3 provides more details.

5.2 Man overboard and contact the emergency services

- Explain and demonstrate the immediate action required by the steerer when someone falls overboard
- Explain and demonstrate the actions required to recover and obtain treatment for the casualty, including for both shore-based and boat-based rescue
- Explain and demonstrate what has to be done when someone goes overboard in a lock. CN6.2 provides more details.

5.3 Fire and other emergencies

- Bringing the boat to the shore, avoiding panic
- Managing evacuation
- Dealing with the emergency
 - First aid for someone ill or injured
 - Use of fire extinguishers
 - Getting help for mechanical problems

5.4 Keeping records

- Know that they need a time log of events and describe how they would keep it

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- Show they can fill in an accident or incident report form
- State who they would contact following an accident or incident.

Unit 6: Discussion and appraisal

Aim: that candidate will be able to:

- Assess their performance and give attention to points of difficulty as the course progresses
- Concur with the trainer's decision on pass/referral
- Contribute to the improvement of future courses.

This unit is about testing knowledge and insight and about improvement, for participants on the course.

6.1 Review your performance halfway through the course

- Reviews can be undertaken more frequently if appropriate, both as part of the group and individually.

6.2 Review performance and concur with passes and referrals at the end

6.3 Complete and return feedback forms

Certificate in Community Boat Management

The Certificate in Community Boat Management Course

This course qualifies the holder, under MCA regulations, to captain a community boat carrying up to twelve passengers on Category A and B waters.

CCBM requirements

The course is for people of 17 and over. They need to have reached the standard set in the boat handling course before attending. They also need to know something about handling groups. The course takes place on a boat meeting NCBA standards for training over at least two full days of continuous training and assessment. It is tutored by an NCBA trainer.



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Unit 1: Taking over any boat

Aim: that you will be able to:

- Establish beforehand that arrangements are sufficient to make a safe and legal trip possible
- Establish the condition, equipment and performance of any boat you take over.
- Demonstrate your ability to learn how to handle a boat on both familiar and unfamiliar stretches of water.

This unit is about what to do before any passengers arrive.

1.1 Arrangements before starting a trip

Be familiar with and review the arrangements that need to be in place before starting the trip.

- Joining Instructions
- Emergency contacts list
- Boat licence and insurance
- Crew makeup and skill set
- How crew, carers/group leaders and passengers will all know what their duties are
- Policy for and availability of personal buoyancy aids
- Availability of food and other provisions
- Procedure for informing emergency services – identify boat position, places to moor, and means of communication.

1.2 Practical walk around the boat:

- Using the Pre-check list in Appendix 1, as an example, walk around the boat and find all the items listed if applicable. Sections 1.3 and 1.4 will help with this.

1.3 Boat Systems

Not every boat will have everything noted here. Find the relevant items and be sure they can use safely everything relevant to using the boat. Follow up with the relevant party on any items that would be expected to be there but cannot be found.

Water and toilets

- Fresh water pump, location and use. Where is the filler point and any overflow?
- How often to re-fill? Instructions about the need to conserve water.
- Locations of hoses, the capacity of tanks, and water points. CRT and other keys
- Safe use of showers, baths, water heaters and boilers.
- Use of pump-out, chemical toilets and gloves.

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- Location of pump-outs, sanitary stations

Heating

- What heating is provided and how to use it
- Are there any restrictions on its use?

Diesel

- How to check the level of diesel fuel in the tank, what is the capacity and reserve
- Where and how is it filled up?
- Where is the fuel isolation switch?
- Checking for leaks
- Understand the problems encountered if it runs out.

Gas

- Type of gas used and its properties
- Danger of explosion
- How to use the cooker if installed.

Mechanical

- Routine maintenance of engine, gearbox and reduction box if fitted
- Oil and coolant levels
- Likely problems that are easily be fixed. When to call out an engineer
- How to start and stop the engine
- Potential problems i.e. change of engine note, the colour of exhaust, batteries not charging
- Operation and use of bilge pump
- Greaser and stern gland packing
- Weed hatch plus alternative methods for clearing the propeller.

Electrical

- Position of batteries and any other electrical power supplies
- Can external power be used?
- Checking battery electrolyte levels if required
- Safe use of fridges, water heaters, radios and TV, mobile phones, batteries and cookers
- Conserving electricity
- Explain the instrument panel
- Identify fuse box location
- Battery isolation switches – position and what to do when leaving the boat.

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External

- What shafts, poles and boathooks are available?
- What ropes are there and how to use them?

Safety

- Are there any specific or unusual safety provisions required for this boat
- Where are the personal buoyancy aids and when should they be used
- Where are the floatation aids, are throw lines available?
- Where is the first aid box?
- Is there any other equipment such as a Defibrillator supplied?
- What fire extinguishers are provided?

1.4 Checks to perform at engine start-up

Find a list that is required for this particular boat, but know the following are common.

Before starting engine

- Fuel levels and primary filter
- Bilges, looking out for blockages, oil or other contamination
- Check engine oil and water coolant, seacocks and filter, if fitted
- Slack in belts
- Stern gland greaser
- Weed hatch.

After starting

- Observe gauges/lights - oil, water temperature, volt meters
- Pump bilges (if required)
- Visual inspection of the engine for loose parts
- Check forward and reverse gears engage
- Check bow thrusters working, where fitted
- Listen for unusual noises
- Observe exhaust colour and density
- Stop the engine
- Know what's normal for the engine and how to report anything that isn't.

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1.5 Take the boat into the stream and test its responses:

- Response to the wind both when moored and in the stream so far as practicable
- Determine power settings on the throttle
- Side movement of stern under high forward and reverse power
- Stopping distance unpowered
- Reversing
- Position of turning point and rate of turn at very low speed, noting the relationship between turning and forward movement.

1.6 Find out about the waters where the boat is used

- Understand the need for and explain what is to be gained from a trip
- To be familiar with the waters the boat is on, before captaining a trip
- Identify any hazards particular to the waters concerned, to take account of these when planning trips.

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Unit 2: Health, Safety and Environmental Management

Aim: that you will be able to:

Assess the competence of any health and safety management system offered to you
Make a formal risk assessment
Understand the need to review written assessments in light of actual circumstances
Communicate with crew, passengers & the public on H&S & environmental issues

This unit is about having an effective health, safety and environment system on the boat.

2.1 List the requirements for a Health & Safety system to be effective

The NCBA requires a complete working system. A complete system provides:

- A short policy statement defining the scope of the system, giving commitment from top management and outlining how this is realised in practise
- Identified responsibilities
- Procedures to provide method statements, operational rules, etc. - often a boat manual
- Communication and training
- Recording, reporting and improvement arrangements.

Safe procedures depend on risk assessments and in many situations these may need to be carried out formally and in writing. But whether formal or not, there should be a culture of sizing up the risks and making sure that what is going to be done can be done safely.

The HSE booklet Five Steps to Risk Assessment provides one method of how to do this.

2.2 Using a Health & Safety System

- Be familiar with the contents of a typical well-constructed H&S system and know how to test a system
- State and describe ways of dealing with the main environmental issues on a waterway.

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2.3 Creating a risk assessment

The purpose of creating a risk assessment is to ensure that a simple safety management system is in place. The system should

- Ensure safety on board for passengers and crew
- Prevent human injury and loss of life, damage to property or the environment
- Comply with applicable regulations and rules
- Keep documentary evidence of risk assessments and safety procedures in place.

The Health and Safety Executive define a hazard as “anything that can cause harm”, and risk as “the chance that somebody will be harmed by the hazard”.

The important thing to decide is the degree to which the hazard is significant, and whether satisfactory precautions have been taken so that the risk of anyone being harmed is small.

The concept of risk assessment is rooted firmly in common sense, and so the process of carrying out a risk assessment should not be made over-complicated. It follows these five basic steps:

- Identify the hazards
- Identify the risks from these hazards e.g. how people may be harmed
- Determine who is at risk from these hazards e.g. passengers, crew and/or the public
- Put in place measures to control the risks
- Monitor the effectiveness of these control measures.

Operators with more than five permanent employees must record their risk assessments and for those with less than five permanent employees, it is strongly recommended that they are recorded.

There are three categories of risk assessment:

- A generic assessment will identify those risks that are ever present and apply them to every situation and location.
- Site-specific assessments identify those risks that are present at that site, or on that route, that are additional to those listed in the generic risk assessment. In both cases, the generic and site-specific risk assessments must be identified and documented.
- A dynamic risk assessment is one carried out on and during the day usually by the skipper. These cover the variables such as weather, group etc. By their very nature these cannot be documented and are the stock in trade of the skipper.

CN 4 gives more information on risk Assessments and how they may be created.

As an exercise, a risk assessment could be made dealing with health, safety and environmental issues for either operating a boat or for using a lock.

2.4 Communication

Understand that communication is a process of giving, receiving and understanding information. List and demonstrate ways of achieving this for health, safety and environmental issues with typical passenger groups. Include:

- Introductory talk on safety for passengers

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- Briefing crew and carers
- Listening to people and responding to what they say
- Notices and warnings

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Unit 3: Group Arrangements

Aim: that you will be able to:

Arrange and supervise catering on board.

Show factual knowledge of the different sorts of groups using community boats - old, young, disabled people, etc.

Manage crew and passengers, supporting other group leaders as appropriate

This unit is about looking after the people involved.

3.1 Catering

Food safety and cleanliness

The main risks

- Illness, maybe serious from infected food - not always obvious from smell or colour
- Physical injury or illness from food contamination, people, other food, foreign objects and insects
- Burns, scalds or cuts from hot pans, open oven or grill, boiling liquids, sharp knives
- Slips or trips from obstructions or spilt material
- Meals are not available when needed.

Handling the risks

Planning before the trip starts

- Menus and supplies to suit storage and cooking arrangements, shopping en-route, the capability of cooks
- Sufficient and suitable cooking pans, crockery, implements and cutlery
- The lead cook should be satisfied with the arrangements on board
- Cleaning materials should be available.

Food storage

- Food should be stored in sealed containers or covered with new foil or cling film
- Shop as planned to control storage times
- Buy fresh meat vacuum-packed where possible and in appropriate amounts for each meal, and cook the whole pack once opened
- Store fresh meat in the refrigerator at the bottom, cheese etc. at top
- Manage refrigerator temperature to be cold at all times whilst not wasting power.

Hygiene

- Wash hands with soap before handling food, utensils, crockery etc. Have a dedicated hand towel. Re-wash each time possibly contaminated things are handled – which includes food
- Wash surfaces before and after preparing food

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- If in doubt, wash utensils etc. before use
- Wash colour-coded chopping boards, knives etc. immediately after use and before use with another type of food – this is especially important after use with fresh or cooked meats. Cross-contamination is a major cause of food poisoning
- Wash up in hot water doing glass and cutlery first, then plates etc. Pre-wipe and soak greasy/burnt-on items and do them last
- Avoid drying up: better to let things air dry. If drying is necessary use clean tea towels, do not allow their use as hand towels.

Cooking & re-heating

- Control access to and passage through the galley whilst it's being used
- Avoid people who are cooking and also having to help with working the boat
- Ensure food is cooked or reheated thoroughly. Inadequate 'warming' of precooked food is a common cause of food poisoning
- Take care to avoid contaminating cooked food, hot or cold, through direct contact or via plates etc.
- Treat any crockery, utensils, cutlery etc. that has been in contact with uncooked meat as contaminated - a classic barbecue mistake is to use the same tongs for handling everything on the grid, cooked or uncooked.

3.2 Knowledge of user groups

- Types of users of the boat - old, young, disabled, special needs
- What are their requirements and special needs if any?
- Can the boat support this type of group?
- Meeting the needs of groups using this particular boat.

3.3 Crew and passenger management

Passenger Management

- Provide clear guidelines to passengers
- Supervise passengers when on or off the boat such as during lock operation.

Crew Management

- Provide clear guidelines to both passengers and crew
- Use hand signals to show clear intentions
- Allocating roles and areas of responsibility
- Instructions before leaving, i.e. stepping on and off
- Rules about radios, alcohol, smoking, lookout ahead
- Using personal buoyancy aids when required
- Head counts at frequent intervals
- Discipline.

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3.4 Skipper and crew roles

When working on a boat there will be a need to take up several roles. A crew member may switch from one role to another depending on where they are on the boat and what situation the boat is in. If the crew is few these roles may be combined.

The roles

Skipper

The Skipper is responsible for making sure everything happens promptly. Many of the tasks can be delegated to other crew members. A successful trip begins with good communication with the crew so they all understand what is expected of them. The Skipper has the final say on all activities on the boat.

Helm

The person in charge of the helm is responsible for all boat movements as directed by the skipper, consulting with the captain when choices which affect boat safety or timetable changes are required.

Bow

As directed by the helm deals with lookout, ropes, mooring etc. at the bow of the boat and fending off when needed. In an emergency, they may remain near the bow in the first instance, only moving aft when it's clear that there is no obstruction preventing this. Otherwise, they take control of the bow section. They may act as a watcher or encourager if someone is overboard, will assist people off the boat over emergency gangways etc.

Passenger Support Person

Provided immediate contact with passengers, handling their requests and needs. If the passengers are attended by a carer welcome and then support the carer during the trip.

Shore side leader

Takes charge of the shore party when working locks, mooring up, moving the boat with ropes, etc. Briefs the rest of the party, ensures safe and efficient working and looks out for things going wrong. In locks, keeps a check on boat position and sees that paddles are operated to the helm's instructions. During an emergency puts shore-based rescue plan into operation.

All

Be familiar with and when appropriate explain to passengers or untrained crew, the safety items:

- Boat manoeuvring
- Fire drill
- Man overboard
- Lock risk assessment
- Boat evacuation.

Observe, check and draw attention to safety matters, e.g. boat hung in a lock or a person in the water, unsafe behaviour by anyone, whether connected with the boat or not.

3.5 Dealing with third parties

- Who is a third party?

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- Rights of third parties
- The candidate's rights
- Courtesy and assertiveness
- Exchange of information.

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Unit 4: Boat handling theory

Aim: that you will be able to:

Explain how boats behave in various conditions.

Describe how to manage single-handedly, in an emergency.

Describe how to acquire local knowledge and show, for the water where the course is conducted, that you have done so.

Select suitable mooring places and describe how to moor in various circumstances.

This unit is about explaining how to control the boat

4.1 Boat handling

- Use of the tiller
- Effect of forward and reverse thrust/cavitation
- The fulcrum point of craft
- Speed, breaking wash, suction effect, passing moored boats
- Depth of water, running aground, freeing a grounded boat
- Wind and current
- River v canal flow, weirs, drag at locks
- How steering is affected by the interactions between the tiller, travel direction, throttle, speed, depth, wind and current
- Winding - choosing how to turn, bow on the bank, using a line, free turn.

4.2 Moving along the waterway

- Rules of the road - passing, giving way
- Coaching beginners
- Choosing the track or positioning the boat within the canal
- Rights of way of other users such as walkers, fishermen or cyclists
- Sound and other signals
- Swing bridges
- Tunnels
- Going single-handed through a lock
- Reversing.

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4.3 Mooring the boat

- On canals
- On wide and narrow rivers
- Coming to a mooring: crew disposition, use of ropes
- Leaving a mooring
- Mooring single-handed.

More details on mooring can be found in Unit 5.5 Practical Boat Handling.

4.4 Knowledge of local routes

- Discuss local routes in some detail
- Places for off-boat visits
- Facilities such as shops, laundrettes and telephone boxes
- Times and distances, access points for disabled people and the emergency services
- Route plans and contingency plans.

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Unit 5: Practical boat handling

Aim: that you will be able to demonstrate your capability to:

- Handle a boat off a quay or bank, onto a quay or bank, along a waterway, passing close to other boats and be able to pass through a lock
- Manage shoreside activities at the lock
- Turn a boat safely, selecting appropriately to free turn, turn against the bank or with ropes
- Reverse a substantial distance - demonstrating the use of poles if required
- Maintain control of the situation when untoward events occur
- Use ropes for mooring, moving and controlling the boat.

Whilst some boats may have bow thrusters for a CCBM assessment their use is not allowed.

This unit is about being proficient in controlling the boat in ordinary use.

5.1 Before leaving a mooring

- Check the depth of the water
- Engine checks and starting procedures
- Untying, and retrieving ropes, spikes, hammers, planks, etc.
- Use of shafts, location of boat equipment on the roof.

5.2 Use of ropes

- Coiling and throwing a rope.
- Tying simple knots and their uses. A Tugman's or Canalman's hitch, round turn and two half hitches, clove hitch and quick release variations should be covered
- Throwing a loop over a bollard
- Bringing the rope back to tie on the boat for increased safety and security
- Stopping a boat on a friction turn
- Use of centre, fore and stern ropes.
- Explain and show how springs are used

5.3 Getting underway and moving along the waterway

- Casting off and using engine controls
- Rules of the road - passing, giving way, overtaking
- On a river, the upstream boat gives way to the downstream boat
- Choosing the track, positioning the boat within the canal to enter and leave locks and going around bends
- Steering a course along the waterway
- Slow down to pass moored boats, meeting in bridges
- Effect of passing craft. Suction and rejection
- The rights of way of other users such as walkers, fishermen and cyclists
- Running aground. Piling v field banks, the danger of cutting across inside bends

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- Speed and its effect. Wash, canal profile, river v canal sections
- Going astern
- Demonstrate emergency stop.

5.4 Passing through a Lock

- Use of risk assessment and review
- Managing shoreside work
- Approach, general awareness of boat movements. Is the lock in favour or against you
- Effects of paddle wash, overflow weirs, wind
- Procedures for putting lock crew ashore
- Mooring and waiting for gates to be opened
- Courtesy to other users
- When or when not and how to use ropes
- Moving into the lock. The crew should be ready to take lines if necessary. Clear instructions either by hand or voice.
- Using a friction turn to stop
- Types of paddle gear and their safe use. Wind paddles up and down. A key will be required if anti-vandal locks are fitted
- Sequence to open and close paddles depending on the direction of travel
- Managing emergencies - hanging up on cill or lines, flooding from gate paddles, windlass flying off the spindle, stopping the flow in an emergency
- Sharing locks with other users
- Leaving a lock - state of gates and paddles, manoeuvring to pick up the shore team.

5.5 Mooring

- Mooring on a waterway
- Places to moor - water depth, interfering with traffic and other canal users, security
- Effect of wind
- Disposition of crew
- Several methods can be used for bringing the boat alongside depending on many factors including the landing point and the type of boat. However, there is a general rule that this should be both slow and safe for the sake of both passengers and crew
- Position of lines and spikes and the need for springs. Not fouling towpath
- Mooring on a river. Turn to face upstream if possible
- Mooring downstream on a river. Stern first. Slow down. Crew ashore
- Use of ropes and engine
- Once moored the position of lines and spikes. Long lines where river levels vary
- Interaction with other boats.

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Places you should not moor at:

- Where there are signs that prohibit mooring
- On private property
- On the side opposite the towpath unless it is signed for mooring
- On a water point or sanitary station unless you are using them
- Near or under bridges
- On or near sharp bends
- Near weirs on a river
- By blind spots
- In or opposite turning points
- Opposite junctions
- Near or in a lock or bridge unless you are going through it
- Overnight in a lock pound (if avoidable)
- Near fisherman during a fishing match
- On landing places for canoes – usually near locks
- On a river bank – use pontoons (if available).

Mooring on a canal

- Boat capabilities may require specific rules for bringing a boat into the bank
- Controlling the boat using a minimum speed
- Crew deployment and use of ropes
- Effect of wind when mooring
- Use of mooring aids such as bollards, pins or spikes to secure the boat.

Mooring on a river

- Similar techniques to canal mooring are used but the boat should be moored facing upstream. If travelling downstream turn the boat before attempting to moor. In fast-flowing rivers, spring lines may be required to control the moored boat.

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Unit 6: Practical boat handling 2

Aim: that you will be able to:

- Navigate the boat competently in all the situations presented to the candidate
- Explain how to navigate competently in situations you may meet elsewhere on the system

This unit is about being able to control the boat in difficult conditions.

6.1 Demonstrate handling

- How to deal with the loss of power through engine failure, loss of propeller or loose shaft
- Loss of steerage
- Going aground. Use of reverse. Use of shafts, ropes and planks
- Use of anchor on rivers or near weirs.

6.2 Emergency procedures

- Demonstrate major incident boat evacuation, from the incident happening to the arrival of emergency services
- Major incidents to be demonstrated or described include man overboard; serious illness or injury on board; fire; loss of engine power, steering
- Running aground.

6.3 Winding the Boat

- Location of winding holes
- Using a line if necessary
- Effect of wind or current
- Depth of water
- Disposition of crew
- Wherever possible demonstrate different methods
- Judging available distances
- Using the bank in forward gear without a line.

6.4 Swing and lift bridges

- Use of CRT key or other security devices on the bridge
- Awareness of road and waterway traffic
- Operation of manual and electric bridges
- Wedges, jacks and interlocks on swing bridges, counterweights on lift bridges

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- Negotiating bridges. Clearances, clear instructions to the crew, crew disposition (not on the roof)
- Courtesy to walkers, residents, road and water traffic.

6.5 Fixed bridges

- Instructions to passengers and crew about the dangers of being rolled or crushed between a bridge arch and boat sides
- Choice of track for visibility and to take a suitable arch
- Standing on or giving way
- Suction effects when passing through the bridge.

6.6 Tunnels

- CRT tunnel instruction boards
- Clear instructions before entering. Inside lights on. Check headlight. No flash photography or torches into the steerer's eyes, arms and legs inside. 'No go' areas during the passage. Lookout. Low passenger noise levels
- No naked lights
- What to do if there is an emergency - headlight fails, fire, person overboard
- Use of tunnel safety features, e.g. distance markers, fluorescent signs, rubbing boards, and chains.

6.7 Other navigational problems

Refer to section 4.4

- Weirs and locks on larger rivers — lockkeepers, traffic signals, power operation
- Staircase locks
- Very deep or deep and wide locks
- Handling the boat in high winds or currents.

Certificate in Community Boat Management

Unit 7: Discussion and appraisal

Aim: that candidate will be able to:

- Assess their performance and give attention to points of difficulty as the course progresses
- Learn from questions and discussions: to know correct answers where these exist; to balance the factors affecting choice where answers vary with circumstance
- Concur with the trainer's decision on pass/referral
- Contribute to the improvement of future courses.

This unit is about testing knowledge and insight and about improvement, for participants and the course.

7.1 Review your performance halfway through the course

- Reviews can be undertaken more frequently if appropriate, both as part of the group and individually.

7.2 Individual questionnaire

- From the bank of questions in CN 7.1 candidates obtain a 70% pass rate. Include questions where it has not been possible to cover sections practically.

7.3 Final Review of performance

- Concur with passes and referrals at the end.

7.4 Complete and return feedback forms

Single-Handed Helm Certificate

The Single-Handed Helm Certificate

This course qualifies the holder under NCBA regulations, to captain/helm a boat single-handed on Category A and B waters.

SHHC requirements

The course is intended for people of 17 years and over and holders of a current qualification to helm a boat with a crew. They need to have reached a recognised before attending. The course takes place onboard a boat meeting NCBA standards for training over at least two full days of continuous training and assessment. It is tutored and assessed by an NCBA trainer.

(Please note that if an SHHC certificate is held currently then only the practical elements of single-handed boating need to be completed and can be done within one day).



Single-Handed Helm Certificate

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Single-Handed Helm Certificate

Unit 1: Taking over any boat

Aim: that you will be able to:

- Establish beforehand that arrangements are sufficient to make a safe and legal trip possible
- Establish the condition, equipment and performance of any boat you take over.
- Demonstrate your ability to learn how to handle a boat on both familiar and unfamiliar stretches of water.

This unit is about what to do before departure.

1.1 Arrangements before starting a trip

Be familiar with and review the arrangements that need to be in place before starting the trip.

- Joining instructions
- Emergency contacts list
- Passage plan (filed ashore)
- Boat licence and insurance
- Policy for and availability of personal buoyancy aids
- Availability of food and other provisions
- Procedure for informing emergency services – identify boat position, places to moor, and means of communication.

1.2 Practical walk round the boat:

- Using the Pre-check list in Appendix 1, as an example, walk round the boat and find all the items listed if applicable. Sections 1.3 and 1.4 will help with this.

Single-Handed Helm Certificate

1.3 Boat Systems

Not every boat will have everything noted here. Find the relevant items and be sure they can use safely everything relevant to using the boat. Follow up with the relevant party on any items that would be expected to be there but cannot be found.

Water and toilets

- Fresh water pump, location and use. Where is the filler point and overflow?
- How often to re-fill? Instructions about the need to conserve water
- Locations of hoses, the capacity of tanks, and water points. CRT and other keys
- Safe use of showers, baths, water heaters and boilers.
- Use of pump-out, chemical toilets and gloves
- Location of pump-outs, and sanitary stations.

Heating

- What heating is provided and how to use it
- Are there any restrictions on its use?

Diesel

- How to check the level of diesel fuel in the tank, what is the capacity and reserve
- Where and how is it filled up?
- Where is the fuel isolation switch?
- Checking for leaks
- Understand the problems encountered if it runs out.

Gas

- Type of gas used and its properties
- Danger of explosion
- How to use the cooker if installed.

Mechanical

- Routine maintenance of engine, gearbox and reduction box if fitted
- Oil and coolant levels
- Likely problems that are easily fixed. When to call out an engineer
- How to start and stop the engine
- Potential problems i.e., change of engine note, the colour of exhaust, batteries not charging
- Operation and use of bilge pump
- Greaser and stern gland packing
- Weed hatch plus alternative methods for clearing the propeller.

Single-Handed Helm Certificate

Electrical

- Position of batteries and any other electrical power supplies
- Can external power be used?
- Checking battery electrolyte levels if required
- Safe use of fridges, water heaters, VHF radios and TV, mobile phones, batteries and cookers
- Conserving electricity
- Explain the instrument panel
- Identify fuse box location
- Battery isolation switches – position and what to do when leaving the boat.

External

- What shafts, poles and boathooks are available?
- What ropes are there and how to use them?

Safety

- Personal PPE / Toe caps / Reflective Tabard
- Are there any specific or unusual safety provisions required for this boat
- Where are the personal buoyancy aids and when should they be used
- Where are the floatation aids, are throw lines available?
- Where is the first aid box?
- Is there any other equipment such as a Defibrillator supplied?
- What fire extinguishers are provided?

Single-Handed Helm Certificate

1.4 Checks to perform at engine start-up

Find a list that is required for this particular boat, but know the following are common.

Before starting engine

- Fuel levels and primary filter
- Bilges, looking out for blockages, oil or other contamination
- Check engine oil and water coolant, seacocks and filter, if fitted
- Slack in belts
- Stern gland greaser
- Weed hatch.

After starting

- Observe gauges/lights - oil, water temperature, voltage meters
- Pump bilges (if required)
- Visual inspection of the engine for loose parts
- Check forward and reverse gears engage
- Check bow thrusters working, where fitted
- Listen for unusual noises
- Observe exhaust colour and density (where applicable)
- Stop the engine
- Know what's normal for the engine and how to report anything that isn't.

1.5 Take the boat into the stream and test its responses:

- Response to the wind both when moored and in the stream so far as practicable
- Determine power settings on the throttle
- Side movement of stern under high forward and reverse power
- Stopping distance unpowered
- Reversing
- Effects of towed/pushed craft
- Position of turning point and rate of turn at very low speed, noting the relationship between turning and forward movement.

Single-Handed Helm Certificate

1.6 Find out about the waters where the boat is used

- To gain knowledge of the waters the boat is on, before journeying
- Identify any hazards particular to the waters concerned, to take account of these when planning the journey and passage plan.

Single-Handed Helm Certificate

Unit 2: Health, Safety and Environmental Management

Aim: that you will be able to:
Assess the competence of any health and safety management system offered to you
Make an appropriate risk assessment
Understand the need to review written assessments in light of actual circumstances
Communicate with management and owners & the public if necessary on H&S & environmental issues
This unit is about having an effective health, safety and environment system on the boat.

2.1 List the requirements for a Health & Safety system to be effective

The NCBA requires a complete working system. A complete system provides:

- A short policy statement defining the scope of the system, giving commitment from top management and outlining how this is realised in practise
- Identified responsibilities
- Procedures to provide method statements, operational rules, etc. - often a boat manual
- Communication and training
- Precautions for safe solo working
- Recording, reporting and improvement arrangements.

Safe procedures depend on risk assessments and in many situations, these may need to be carried out formally and in writing. But whether formal or not, there should be a culture of sizing up the risks and making sure that what is going to be done can be done safely. The HSE booklet Five Steps to Risk Assessment provides one method of how to do this.

2.2 Using a Health & Safety System

- Be familiar with the contents of a typical well-constructed H&S system and know how to test a system
- State and describe ways of dealing with the main environmental issues on a waterway.

2.3 Creating a risk assessment

Single-Handed Helm Certificate

The purpose of creating a risk assessment is to ensure that a simple safety management system is in place. The system should

- Ensure safety on board
- Prevent human injury and loss of life, damage to property or the environment
- Comply with applicable regulations and rules
- Keep documentary evidence of risk assessments and safety procedures in place.

The Health and Safety Executive define a hazard as “anything that can cause harm”, and risk as “the chance that somebody will be harmed by the hazard”.

The important thing to decide is the degree to which the hazard is significant, and whether satisfactory precautions have been taken so that the risk of anyone being harmed is small.

The concept of risk assessment is rooted firmly in common sense, and so the process of carrying out a risk assessment should not be made over-complicated. It follows these five basic steps:

- Identify the hazards
- Identify the risks from these hazards e.g. how people may be harmed
- Determine who is at risk from these hazards e.g. passengers, crew and/or the public
- Put in place measures to control the risks
- Monitor the effectiveness of these control measures.

Operators with more than five permanent employees must record their risk assessments and for those with less than five permanent employees, it is strongly recommended that they are recorded.

There are three categories of risk assessment:

- A generic assessment will identify those risks that are ever present and apply them to every situation and location.
- Site-specific assessments identify those risks that are present at that site, or on that route, that are additional to those listed in the generic risk assessment. In both cases, the generic and site-specific risk assessments must be identified and documented.
- A dynamic risk assessment is one carried out on and during the day usually by the skipper. These cover the variables such as weather, group etc. By their very nature these cannot be documented and are the stock in trade of the skipper.

As an exercise, a risk assessment could be made dealing with health, safety and environmental issues for either operating a boat or for using a lock.

2.4 Communication

Understand that communication is a process of giving, receiving and understanding information. List and demonstrate ways of achieving this for health, safety and environmental issues with typical passenger groups. Include:

- Listening to people and responding to what they say
- Notices and warnings
- Interaction with other boaters and members of the public

Single-Handed Helm Certificate

3.5 Dealing with third parties

- Who is a third party?
- Rights of third parties
- Courtesy and assertiveness
- Exchange of information.

Single-Handed Helm Certificate

Unit 4: Boat handling theory

Aim: that you will be able to:

Explain how boats behave in various conditions
 Describe how to manage single-handed, in an emergency
 Describe how to acquire local knowledge and show, for the water where the course is conducted, that you have done so
 Select suitable mooring places and describe how to moor in various circumstances.

This unit is about explaining how to control the boat

4.1 Boat handling

- Use of the tiller
- Effect of forward and reverse thrust/cavitation
- The fulcrum point of craft and towed craft
- Speed, breaking wash, suction effect, passing moored boats
- Depth of water, running aground, freeing a grounded boat
- Wind and current
- River v canal flow, weirs, drag at locks
- How steering is affected by the interactions between the tiller, travel direction, throttle, speed, depth, unpowered appendages, wind and current
- Winding - choosing how to turn, bow on the bank, using a line, free turn.

4.2 Moving along the waterway

- Rules of the road - passing, giving way
- Choosing the track or positioning the boat within the canal
- Rights of way of other users such as walkers, fishermen or cyclists
- Sound and other signals
- Swing bridges
- Tunnels
- Single-handed lock wheeling
- Reversing.

Single-Handed Helm Certificate

4.3 Mooring the boat

- On canals
- On wide and narrow rivers
- Coming to a mooring: crew disposition (if available), use of ropes
- Leaving a mooring
- Mooring

4.4 Knowledge of routes

- Discuss routes in some detail
- Facilities such as shops, laundrettes and telephone boxes
- Times and distances, access points for emergency services
- Route plans and contingency plans.

Single-Handed Helm Certificate

Unit 5: Practical boat handling

Aim: that you will be able to demonstrate your capability to:

- Handle a boat off a quay or bank, onto a quay or bank, along a waterway, passing close to other boats and be able to pass through a lock
- Manage shoreside activities at the lock
- Turn a boat safely, selecting appropriately to free turn, turn against the bank or with ropes
- Reverse a substantial distance
- Maintain control of the situation when untoward events occur
- Use ropes for mooring, moving and controlling the boat.

Whilst some boats may have bow thrusters for assessment their use is not allowed.

This unit is about being proficient in controlling the boat in ordinary use.

5.1 Before leaving a mooring

- Check the depth of the water
- Engine checks and starting procedures
- Untying, retrieving ropes, spikes, hammers, planks, et cetera
- Use of shafts, location of boat equipment

5.2 Use of ropes

- Coiling and throwing a rope.
- Tying simple knots and their uses. A Tugman's or Canalman's hitch, round turn and two half hitches, clove hitch towing arrangements and quick release variations should be covered
- Throwing a loop over a bollard
- Bringing the rope back to tie on the boat for increased safety and security
- Stopping a boat on a friction turn
- Use of centre, fore and stern ropes.
- Explain and show how springs are used

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5.3 Getting underway and moving along the waterway

- Casting off and using engine controls
- Rules of the road - passing, giving way, overtaking, manoeuvring with difficulty signals
- On a river, the upstream boat gives way to the downstream boat
- Choosing the track, positioning the boat within the canal to enter and leave locks and going around bends
- Steering a course along the waterway
- Slow down to pass moored boats, meeting in bridges
- Effect of passing craft, suction and rejection
- Rights of way and other users such as walkers, fishermen and cyclists
- Running aground. Piling v field banks, the danger of cutting across inside bends
- Speed and its effect. Wash, canal profile, river v canal sections
- Going astern
- Demonstrate emergency stop.

5.4 Passing through a Lock

- Use of risk assessment and review
- Approach, general awareness of boat movements. Is the lock in favour or against you?
- Effects of paddle wash, overflow weirs, wind
- Mooring and waiting/ opening gates to be opened
- Courtesy to other users
- When or when not and how to use ropes
- Moving into the lock.
- Using a friction turn to stop
- Egress and access to boat/lockside
- Types of paddle gear and their safe use. Wind paddles up and down. A key will be required if anti-vandal locks are fitted
- Sequence to open and close paddles depending on the direction of travel
- Managing emergencies - hanging up on cill or lines, flooding from gate paddles, windlass flying off the spindle, stopping the flow in an emergency
- Sharing locks with other users
- Leaving a lock - state of gates and paddles, mooring/manoeuvring to close gates.

5.5 Mooring

- Mooring on a waterway
- Places to moor - water depth, interfering with traffic and other canal users, security
- Effect of wind
- Several methods can be used for bringing the boat alongside depending on many factors including the landing point and the type of boat. However, there is a general rule that this should be both slow and safe.
- Position of lines and spikes, the need for springs. Not fouling towpath
- Mooring on a river. Turn to face upstream if possible

Single-Handed Helm Certificate

- Mooring downstream on a river. Stern first. Slow down. Crew ashore (where available)
- Use of ropes and engine
- Once moored the position of lines and spikes. Long lines where river levels vary
- Interaction with other boats.

Places you should not moor at:

- Where there are signs that prohibit mooring
- On private property
- On the side opposite the towpath unless it is signed for mooring
- On a water point or sanitary station unless you are using them
- Near or under bridges
- On or near sharp bends
- Near weirs on a river
- By blind spots
- In or opposite turning points
- Opposite junctions
- Near or in a lock or bridge unless you are going through it
- Overnight in a lock pound (if avoidable)
- Near fisherman during a fishing match
- On landing places for canoes – usually near locks
- On a river bank – use pontoons (if available).

Mooring on a canal

- Boat capabilities may require specific rules for bringing a boat into the bank
- Controlling the boat using a minimum speed
- Use of ropes
- Effect of wind when mooring
- Use of mooring aids such as bollards, pins or spikes to secure the boat.

Mooring on a river

- Similar techniques to canal mooring are used but the boat should be moored facing upstream (if practicable). If travelling downstream turn the boat before attempting to moor. In fast-flowing rivers, spring lines may be required to control the moored boat.

Single-Handed Helm Certificate

Unit 6: Practical boat handling 2

Aim: that you will be able to:

- Navigate the boat competently in all the situations presented to the candidate
- Explain how to navigate competently in situations you may meet elsewhere on the system

This unit is about being able to control the boat in difficult conditions.

6.1 Demonstrate handling

- How to deal with the loss of power through engine failure, loss of propeller or loose shaft
- Loss of steerage
- Going aground. Use of reverse. Use of shafts, ropes and planks
- Use of anchor on rivers or near weirs.

6.2 Emergency procedures

- Demonstrate major incident boat evacuation, from the incident happening to the arrival of emergency services
- Lone Worker policies to be assessed and where practicable tested (Radio / VHF)
- Running aground.

6.3 Winding the Boat

- Location of winding holes
- Using a line if necessary
- Effect of wind or current
- Depth of water
- Wherever possible demonstrate different methods
- Judging available distances
- Using the bank in forward gear without a line.

6.4 Swing and lift bridges

Single-Handed Helm Certificate

- Use of C&RT key or other security devices on the bridge
- Awareness of road and waterway traffic
- Operation of manual and electric bridges
- Wedges, jacks and interlocks on swing bridges, counterweights on lift bridges
- Negotiating bridges. Clearances,
- Courtesy to walkers, residents, road and water traffic.

6.5 Fixed bridges

- Awareness of dangers of being rolled or crushed between bridge arch and boat sides
- Choice of track for visibility and to take the suitable arch
- Standing on or giving way
- Suction effects passing through the bridge.

6.6 Tunnels

- C&RT tunnel instruction boards
- Inside lights on. Check headlight,
- No naked lights
- What to do if there is an emergency - headlight fails, fire, person overboard
- Use of tunnel safety features, e.g. distance markers, fluorescent signs, rubbing boards, chains, and pre-booked passage.

6.7 Other navigational problems

- Weirs and locks on larger rivers — lockkeepers, traffic signals, power operation
- Staircase locks
- Very deep or deep and wide locks
- VHF requirements
- Handling the boat in high winds or currents.

Unit 7: Discussion and appraisal

Aim: that candidate will be able to:

- Assess their performance and give attention to points of difficulty as the course progresses

Single-Handed Helm Certificate

- Learn from questions and discussions: to know correct answers where these exist; to balance the factors affecting choice where answers vary with circumstance
- Concur with the trainer's decision on pass/referral
- Contribute to the improvement of future courses.

This unit is about testing knowledge and insight and about improvement, for participants and the course.

7.1 Review your performance halfway through the course

- Reviews can be undertaken more frequently if appropriate, both as part of a group and individually.

7.3 Final Review of performance

- Concur with passes and referrals at the end.

7.4 Complete and return feedback forms

Lockside Assistance

The Lockside Assistant Course

This practical course which should be a minimum of a half day offers the candidate the skills and knowledge to act as a Lockside Assistant. A Lockside Assistant can become an extra set of eyes, ears and hands for the helmsman.

The course was created for the Waterways Chaplains. No previous experience is needed and a limited amount of pre-course reading is required. It is a way for chaplains to interact with peripatetic boaters. The course uses places meeting the NCBA standards for training. It is tutored by an NCBA Trainer.



Lockside Assistance

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Lockside Assistance

Unit 1: Preparation

Aim: the candidate will be able to:

- Know the good practices expected from them by MCA, CRT and EA
- Use written risk assessments, adjusting them in light of actual circumstances
- Deal with health, safety and environmental issues, including communicating with the captain and crew members.

This unit is about assisting boaters transiting a lock.

1.1 Read and be familiar with The Boaters Handbook

- The Boater's Handbook is published by the Canal & River Trust with Environment Agency. As of 2022, the latest edition is dated "Spring 2022". This is best done before the candidate joins the course.

Unit 2: Health, safety and environment

Aim: the candidate will be able to:

- Use generic risk assessments, adjusting them in light of actual circumstances
- Communicate appropriately about health, safety and environmental matters

This unit is about helping candidates to see that pennings are made safely and without harm to their health or the environment.

2.1 Be familiar with a standard risk assessment

Passing through a lock

- Explain how each item helps you work a lock more safely
- Explain how you use the standard assessment
- Acting on the items that matter whilst discarding those that do not
- Adding actions for risks special to a particular lock
- Awareness of water-based diseases and their impact.

2.2 Show practical care for the environment

Lockside Assistance

- Always leave the lock as you would expect to find it
- Check for local signage and instructions
- Shut the gates behind you
- Keep to towpaths
- Utilise lock crossovers
- Respect wildlife
- Do not pollute the water in any way.

2.3 Explain how communication is listening, telling and understanding

- Offer help as required
- Know how to accept instructions from the helmsman and crew
- Know how to check that communication has been understood
- Know to check they understand how much of their initiative they can use
- Observe common body language to see what's meant beyond what's said
- Listen, observe and report accurately to the captain when appropriate.

Unit 3: Group arrangements

Aim: the candidate will be able to:

- Understand the roles of the boat's crew
- Act as Lockside assistant.

This unit is about looking after the people involved.

3.1 Crew and passenger management

- Be able to show an understanding of the roles and responsibilities of the helm, crew and passengers.

3.2 Practical

The candidate should be able to:

- Communicate with those involved
- Have awareness of people stepping on or off the boat
- Use personal buoyancy aids when required
- Communicate using hand signals
- Keep a 360° lookout and know why it is needed.

Lockside Assistance

Unit 4: Practical boat handling through a lock.

Aim: the candidate will be able to:

- Help with locks.

This unit is about working the boat.

4.1 Use of ropes

- Coiling and throwing a rope
- Taking advice from the helm as to the use of ropes
- Securing a rope to tee stud, a bollard, a ring or spikes
- Bringing a rope back onto the boat for increased safety and security
- Use of fore, stern and centre ropes as required

4.2 Travelling through a Lock

Explain at the lock side, how to work the lock

- Describe how a boat moves up through a lock to a higher level
- Describe how a boat moves down through a lock to a lower level
- Explain the differences between ground and gate paddles and how each is used.
- Practical risk assessment – show the use of what was learnt in section 2.1
- Explain how to get ashore safely
- Show courtesy to other users - sections 2.3 & 2.6 in practice
- Types of paddle gear for both ground and gate paddles, their safe usage - winding down rather than letting them drop. Anti-vandal locks
- Using a windlass safely
- Make sure all paddles are correctly set before starting
- How to leave gates and paddles when leaving a lock
- Know what to do in the following emergencies:
 - Hanging up on cill or ropes
 - Flooding from gate paddles
 - Windlass off spindle
 - Someone falling in.
- Troubleshooting

Lockside Assistance

Unit 5: Emergencies

Aim: the candidate will be able to demonstrate the drills needed in emergencies during boating, in particular, those relating to:

- Man overboard
- Fire
- Sickness or injury
- Mechanical failure.

This unit is about explaining how to deal with emergencies.

5.1 Information

- Be able to explain the roles of captain and crew in an emergency
- Indicate what maps and guides and arrangements are needed to find out where the lock is.

5.2 Man overboard and calling the emergency services

- Explain and demonstrate the immediate action required by the helmsman when someone falls overboard
- Explain and demonstrate the actions required to recover and obtain treatment for the casualty, including for both shore-based and boat-based rescue
- Explain and demonstrate what has to be done when someone goes overboard in a lock. CN6.2 provides more details.

5.3 Fire and other emergencies

- Dealing with the emergency
 - Obtaining First Aid for someone ill or injured
 - Getting help for mechanical problems.
 - To offer assistance if required for instance What Three Words, local directions
- Assist with managing an evacuation

5.4 Explain and demonstrate the uses of safety equipment

- Be able to demonstrate how a personal buoyancy aid should be put on.
- Be able to demonstrate the use of a throw line.

Lockside Assistance

Unit 6: Discussion and appraisal

Aim: at the end of this teaching practice the candidate must be able to operate a lock when ascending or descending with a boat in a safe and controlled manner.

This unit is about testing and improvement, for the participants and the course itself.

6.1 Complete individual multi-choice test

6.2 Review progress

- Review progress at least at the halfway point of the course
- Reviews can be more frequent if appropriate, both as part of the group and individually.

6.3 Complete and return feedback forms