

Cal Sailing Novice Test Guidelines

September 26, 2025

Introduction and Objectives

The Novice Skipper rating is essentially a learner's permit which allows a member to practice skills in the lighter wind area (Novice Area) on their own or with another club member. Novice ratings are important during the lighter wind season (October through April), where it is hard to get a Junior rating as there are few days with sufficient winds to do a Junior test. During the windy season, members are encouraged to work toward a Junior rating instead of getting a Novice rating first. Among other reasons, testers are consumed with Junior tests during this period. However, there are cases where getting a Novice rating would be more useful for a particular member than focusing on Junior, so a tester may choose to administer a Novice test for them.

Essentially, getting this rating means having the skills to safely practice Junior skills in the Novice Area. So the skill threshold is somewhat lower than that for the Junior rating for the same skills. Also important is having sufficient skills not to damage Club boats (e.g. in docking).

The Club does not teach to a standard, unlike most sailing schools, and this is a unique strength. We recognize that there is generally no one "right" way to do many things, and we encourage students to find a technique that works well for them. Similarly, Senior testers have considerable latitude in how they evaluate Novice candidates, and the individual tester's judgement plays an important role.

We do, however, have a set of skills that a candidate must demonstrate in specified conditions, and it is important that the tester evaluates these skills along with other factors, such as situational awareness, knowledge, and judgement. Correspondingly, it is important that candidates know what skills they will have to demonstrate and how. While testers have considerable latitude in how they test, wildly different expectations among different testers is not good for the Club or its members.

These guidelines attempt to set a common base of skills and expectations for testers to consider, and they are not intended to be a rigid standard.

Test Requests

Tests are requested in several ways, from simply asking a Senior for a test to a formal request via Slack or the Self-Evaluation and Test Request system on the website.

Testers can see open test requests [here](#) (you have to be logged into the website to use this link). On this page, you can respond to test requests (send email), see comments from other testers, and post comments of your own.

Test Format

The typical format for the test is that the candidate demonstrates the skills by sailing single-handed. It is not required to use the jib. The tester observes from the dock. The Club should be open with a Day Leader on duty and an operable rescue skiff in the water. The Day Leader should be told that a test will be given and that their assistance may be needed.

A tester may also conclude from sailing with a candidate that their sailing skills meet the requirements for a Novice rating. A typical scenario is a Junior test where the candidate did not meet the Junior requirements or where the wind was not strong enough. But it could be any situation where the tester observes the candidate's sailing skills. In this case, it is strongly recommended that the tester observe the candidate launch and dock a boat single-handed, and also capsize, anchor, and recover on their own.

Conditions

The test may be given in any wind conditions that allow sailing the boat. Testers are discouraged from giving the test in very light or very heavy winds, as both of these are quite challenging for sailors at the Novice level.

The candidate must single-hand the boat. Use of the jib is not required.

The candidate must stay within the Novice Area at all times. Leaving the Novice Area fails the test.

Feedback

When the test is completed, it is essential to give the candidate detailed feedback. If they passed, this should include how they could have done better.

If they did not pass, they need to know exactly why. Which skill was deficient and how, and how to work on improving that skill. This could be as simple as "get more instruction on this" or as detailed as a short lesson on it, depending on the tester's interest and time. The tester should indicate their availability to do a retest if they are open to this.

This is a test of very basic sailing skills, so some coaching for candidates who pass could be useful, for example how to make their tacks or gybes better, or how to dock better.

Novice Skills

The following is this list of skills for the Junior rating from the ORs, which a discussion of each of them.

Novice Skipper Sailing Skills Checklist:

1. Departing and docking

Must be able to depart and dock with the assistance of the tester on the dock. Precision docking is not required, but banging into the dock is not acceptable. Must sail a slow-sail approach to the dock.

Must be able to get away from the dock into the South Basin without hitting the sea wall or the middle dock. Perfect sail trim is not necessary, but adequate sail trim to sail away is.

Some testers do this part of the test at the beginning and then call the test off if the candidate doesn't do it acceptably. This is a better approach than going through the entire test and then not passing them because of departing or docking problems.

2. Tacking

Do 3 or 4 tacks in a row. Consistently get through the tack and make upwind progress. How quickly they go from one tack to the next is not important, nor is tacking from close-hauled to close-hauled.

Upwind progress is very important. If a candidate can tack perfectly well beam reach to beam reach but cannot make progress upwind, they are not ready.

3. Gybing

Do 3 or 4 gybes in a row without rounding up excessively.

At this level, candidates are usually very tentative about sailing downwind. How quickly they go from one gybe to the next is not important. It is perfectly acceptable for a candidate to do a gybe or two and then go upwind to start the remaining ones. Indeed, this is far better than doing all of them and going out of the Novice Area.

The boom must come across the boat in a controlled manner, and large round-ups after the gybe are not acceptable. Since this rating is a learner's permit, the tester should allow some latitude on round-up, but not on uncontrolled boom crossing the boat.

4. Capsize recovery using anchor

The candidate must inspect the anchor before sailing, even if taking a boat someone else had already sailed.

Sail upwind away from the dock to a safe point for a capsize (where it would be unlikely to blow downwind into danger). Capsize, set the anchor properly, recover the boat, retrieve the anchor, and stow it properly.

Anchor must be set cleanly and not tangled around other lines, the forestay, etc. If the wind is sufficiently high, the boat should end up pointed into the wind.

It is not important that the candidate get into the boat as it is coming up. They must be able to get into the boat after the capsize without assistance. They may use lines they carry for this purpose (e.g., as a “stirrup”).

The boat should not capsize as they are retrieving the anchor.

It is important that the anchor be cleaned of mud and stowed properly after the capsize recovery. It is not acceptable to leave the anchor and rode loose on the foredeck or in the cockpit.

Important note on testing in light wind

In heavier wind, you can tell watching from land whether the anchor was deployed properly, as the boat will line up into the wind. In lighter wind, this will not happen. So it's a good idea to get in the rescue skiff with the Day Leader and look at the situation close up.

Other Knowledge

Candidate should be able to describe

- Boundaries of the Novice Sailing Area
- When a Novice is allowed to take a boat out
- How many people can they bring with them, and do these people need to be Club Members

Other Important Factors

There are some soft factors that are extremely important to evaluate: situational awareness and judgement.

Situational awareness includes clearing the area before a tack or gybe, awareness of other boats, boards, swimmers, etc. in the vicinity, and awareness of traffic around the dock when departing and docking.

Judgement is much harder to evaluate, as creating situations to test it is not encouraged, nor is presenting scenarios for the candidate to discuss. However, the tester should be able to recognize instances of bad judgement.

These factors are just as important at the Novice level as they are at the Junior level.