

# Trilogy Crew Skills Development and Rank Promotion Program

Revised 3/2023

Aloha Trilogy Crew member! The intention of this training guide is to provide you with the guidance and framework to develop a fundamental set of skills and practices that will set you up for success as a member of the Trilogy crew.

Each crew member's abilities, experience, and aptitude are unique. Therefore, everyone may progress through this program at their own pace. Trilogy crew members are driven to excellence. Our expectation is that every member of this team fully applies themselves to the training and development of both technical and soft skills to ensure competence and confidence in carrying out your job duties.

A newly hired crew member with minimal boating experience is hired as a deckhand and begins working on mastering the skills listed in the deckhand checklist. Completion of the deckhand checklist leads to promotion to 3<sup>rd</sup> mate. Completion of the 3<sup>rd</sup> mate checklist leads to promotion to 2<sup>nd</sup> mate and so on.

Progression is self-guided. In order to support consistency in training standards, crew members must find an opportunity to demonstrate each skill or task for a designated training captain. 1<sup>st</sup> mates can no longer sign. Crew will be evaluated on each item and scored on a scale of 1-3:

1. "Needs improvement" - Crew member made an attempt but was unable to successfully demonstrate the skill or task independently with proficiency that meets standards,
  2. "Meets Standard" - Crew properly demonstrated skill or task without assistance.
- or
3. "Exemplary"- Crew member demonstrated skill or task to a degree of quality that could be used as an example to teach others..

There is a space in front of each item for the training captain to give a score of 1, 2, or 3; the date; and their initials. If you receive a "needs improvement" on your first attempt, you can try again at a later date to better execute the skill to earn a higher score. Crew members must earn a "2" or "3" on all items in their current rank checklist AND demonstrate a readiness to learn and excel at the next level to be designated as eligible for promotion. Final promotion is granted by management approval based on current staffing needs.

## Promotion Requirements

Promotions examinations will be offered on a quarterly basis. The follow items must be renewed prior to promotion at each rank level:

- Participation in at least one community service event (minimum four hours)
- Up to date on USCG required MOB, Fire, and Abandon ship drills
- No administrative disciplinary action in the last 6 months
- Exams are to be scheduled ahead of time and taken in person as part of performance review.

# Deckhand

Responsibilities: Support basic crew functions under the direction and guidance of the captain and 1<sup>st</sup> mate.

## Learning objectives:

- Ability to work in a team environment and take direction from superiors.
- Ability to communicate effectively with other crew members
- Familiarity with vessel systems and equipment
- Knowledge of safety procedures and protocols
- Demonstrate consistent and reliable on-time attendance to all scheduled shifts.

## Skills Checklist:

### General

- Score\_\_ Date\_\_ Capt\_\_ Free dive to 15ft
- Score\_\_ Date\_\_ Capt\_\_ How to check the CO2 system
- Score\_\_ Date\_\_ Capt\_\_ Switch out the CO2 on the soda machine
- Score\_\_ Date\_\_ Capt\_\_ Pumping out
- Score\_\_ Date\_\_ Capt\_\_ Sell logo wear using square app
- Score\_\_ Date\_\_ Capt\_\_ UKG clock in clock out process
- Score\_\_ Date\_\_ Capt\_\_ Look up menu item ingredients on portal

### Mariner

- Score\_\_ Date\_\_ Capt\_\_ Demonstrate proficiency securing a boat in a slip
- Score\_\_ Date\_\_ Capt\_\_ Properly secure mooring lines for end of day tie up
- Score\_\_ Date\_\_ Capt\_\_ Docking Procedures, hand signals and accurate numbers **SOP**
- Score\_\_ Date\_\_ Capt\_\_ Skiff handling
- Score\_\_ Date\_\_ Capt\_\_ Demonstrate proper cleating to dock
- Score\_\_ Date\_\_ Capt\_\_ Properly coil and toss a line
- Score\_\_ Date\_\_ Capt\_\_ Snorkel gear setup
- Score\_\_ Date\_\_ Capt\_\_ Galley setup (without assistance)
- Score\_\_ Date\_\_ Capt\_\_ Hoisting and dropping main sail procedures **SOP**
- Score\_\_ Date\_\_ Capt\_\_ Handling line on a winch
- Score\_\_ Date\_\_ Capt\_\_ Furl and unfurl a headsail

### Safety

- Score\_\_ Date\_\_ Capt\_\_ Setup and breakdown the O2 and AED
- Score\_\_ Date\_\_ Capt\_\_ Quarterly drills
- Score\_\_ Date\_\_ Capt\_\_ Beach loading (New Hire Packet for guidelines) must be signed off by Captain Michael Snow
- Score\_\_ Date\_\_ Capt\_\_ Location and use of all fire suppression equipment
- Score\_\_ Date\_\_ Capt\_\_ Understand proper sanitation procedures (heads, snorkel gear, food service etc.)

# Deckhand continued

Locate all safety equipment unassisted on each boat, identify function and overall understanding of usage of fire boy, air shut off, fuel shut off, fire extinguishers, EPIRB, life float, throw ring, VHF, rigging cutters, first aid and life-saving equipment

**I** Score\_\_\_ Date\_\_\_ Capt\_\_\_    **II** Score\_\_\_ Date\_\_\_ Capt\_\_\_    **III** Score\_\_\_ Date\_\_\_ Capt\_\_\_    **IV** Score\_\_\_ Date\_\_\_ Capt\_\_\_

**V** Score\_\_\_ Date\_\_\_ Capt\_\_\_    **VI** Score\_\_\_ Date\_\_\_ Capt\_\_\_    **VII** Score\_\_\_ Date\_\_\_ Capt\_\_\_

**Hulopoe** Score\_\_\_ Date\_\_\_  
Capt\_\_\_

## Knots

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Bowline**

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Half hitch**

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Clove hitch**

## Training Portal Lessons/Clinics

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Learning Maui's Wind and Waves**

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Deckhand Handbook**

Score\_\_\_ Date\_\_\_ Capt\_\_\_ **Fully complete one cultural narrative section (ex. DL series)**

## Exam

Pass Deckhand Exam

Food Handlers Card

Liquor Card

Hawaiian Boaters Card

AZ 1<sup>st</sup> Aid/CPR Certification

## 3<sup>rd</sup> Mate

Responsibilities: Independently conduct basic crew functions under the direction and guidance of the captain and 1<sup>st</sup> mate.

### Learning Objectives:

- Knowledge of safety procedures and protocols
- Familiarity with Maui weather
- Ability to perform essential crew functions with minimal direction
- Demonstrate an understanding that you have a roll and can be proactive and responsible for the tasks at hand and overall trip success

### Skills Checklist:

Ability to perform all tasks and duties of lower ranks in addition to the following:

#### Mariner

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead raising and lowering main and jib sails
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Properly tension shmgang lines at end of day, with consideration for the change in tide
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Bottom Scrub
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Know location and be able to describe the function of bilge pump and float switches
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Discuss reefing, when and why its needed
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Turn on/off Cabin lights at breaker
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Turn on/off Navigation lights at breaker
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Turn on/off the batteries
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Turn on/off inverter & Generator and know what equipment cannot run when generator is off depending on boat
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Hook up to shore power and be able to verify the boat is charging

#### Training Portal Lessons/ Clinics

- Naturalist Lecture Series  101 Fish ID and Ecology  102 Whale Naturalist  103 Sea Turtle Biology  105 Invertebrate ID and Ecology  106 Marine Mammals
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Beach loading Clinic    Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lifeguarding Clinic
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Freediving Clinic  Complete one cultural narrative section (ex. DL series)

#### Fafa's

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Give Cultural Narrative
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Give Island talk
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Give Fish talk
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead Snorkel Tour
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Short Whale Talk (ex. Abbreviated whale talk for snorkel and sunset trips)
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Observe Beach Check-In and briefing with 1<sup>st</sup> Mate
- Pass 3<sup>rd</sup> Mate Exam  Lifeguard Certification

## 2<sup>nd</sup> Mate

Responsibilities: Independently conduct crew functions under the direction and guidance of the captain and 1<sup>st</sup> mate.

### Learning objectives:

- Proficiency in trip timing
- Knowledge of safety procedures and protocols
- Ability to lead and manage the deck crew
- Familiarity with vessel systems and equipment
- Ability to perform basic maintenance tasks
- Demonstrated diligence and work ethic in carrying out assigned tasks
- Leadership potential and ability to supervise a group of crew members
- Ability to lead a trip, knowing trip schedule and protocols

### Skills Checklist:

Ability to perform all tasks and duties of lower ranks in addition to the following:

#### General

- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Fuel South Side
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Fuel West Side
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Able to Identify and Inspect Zincs
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Take apart and assemble head
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Raise and lower Anchor **SOP**
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Check-in guests, amend manifest, accept square payment for walk-up guests
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Understand basic snorkel gear repair

#### Mariner

- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Describe the different points of sail
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Describe tell tales function
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Reef a sail w/o instruction
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Turn engines on/off
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Demonstrate throttle control Safety
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Demonstrate ability to quickly operate autopilot
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Set up and run fire hose
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Demonstrate pivoting a boat–open water
- Score \_\_\_ Date \_\_\_ Capt \_\_\_ Switch from raw water to bilge and back

## 2<sup>nd</sup> Mate continued

### Safety

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Perform Monthly safety inspection with COR/MOR  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Inspect all bilge float switches  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Test High water alarm  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Inspect Life Jackets  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Test and remove EPIRB  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Cycle and inspect seacocks  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Clean and inspect raw water basket  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Test strobes  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Know how to complete incident reporting

### Knots

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Sheet bend  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Stopper Knot  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Square Knot

### Training Portal Lessons/Clinics

- Naturalist 200 Series
  - 202 Shark and Ray Biology
  - 203 Island / Site History
  - 204 Conservation in Hawaii
  - 207 Island Geology
  - 208 Ahupua'a System
  - Complete one cultural narrative section (DK series)
- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Marlin Spike 201  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Anchoring Clinic

### Fafa's

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Give Site Briefing x3  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Snorkel 101 x3  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Complete solo check-in and beach briefing Kaanapali  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Complete solo check-in Lahaina Harbor

### Exam

- Pass 2<sup>nd</sup> Mate Exam

## Jr 1<sup>st</sup> Mate

Responsibilities: Basic ability to lead crew and facilitate trips, assist the captain in navigation, safety, and other duties related to the operation of the vessel, as well as supervise the deck crew and manage logistics.

### Learning Objectives:

Ability to perform all tasks and duties of lower ranks in addition to the following:

- Demonstrate consistent care for vessel cleanliness, organization and maintenance
- Demonstrate attitude of leaving things better than you found it, not leaving something for crew the next day to deal with
- Proficiency in navigation and chart software
- Knowledge of safety procedures and protocols
- Ability to lead and manage the deck crew and logistics team
- Ability to perform basic maintenance tasks
- Familiarity with standard operating procedures & contingency plans for different types of voyage or operations. ie aware of alternative destinations based on weather conditions.
- Proficiency in boat handling & maneuvering, including mooring, & anchoring.
- Ability to safely return to harbor and dock boat
- Ability to make sound decisions based on critical thinking and analysis of the situation.
- Experience in managing the crew & delegating tasks, including coordinating with other departments
- Demonstrated commitment to ongoing professional development and training.

### Skills Checklist:

#### General

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Be able to PROPERLY order prep

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Be able to complete alcohol counts

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Be able to complete logo counts

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate ability to lead crew in complete and proper closing of boat (cleaning, end of day procedures, properly following directions laid out by COR/MOR of that vessel)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate proficiency in helm connect (ex. Logging maintenance tasks, checking tasks off once completed)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Understand what chemicals are appropriate for different surfaces/uses

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Consistently setting the example for crew working under you (ex. Lifeguarding, cleaning the boat to a high standard, engaging with guests, learning names, staying off your phone etc.)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Shadow a 1<sup>st</sup> Mate or Senior 1<sup>st</sup> Mate training a new crew

# Jr 1<sup>st</sup> Mate continued

## Maintenance

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Engine Checks

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Oil Change x2

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate proper VHF communication (calling in/out of Harbor, boat to boat communication on 16)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Understand appropriate radio comms for emergency situations

## Safety

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead Fire Drill

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead Man Overboard Drill

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead Abandon Ship Drill

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Lead Medical Emergency Drill

## Mariner

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Correctly set and trim sail

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Going aloft and rigging inspection (Bosun Chair)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Position boat for end of the day tie up

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Pull boat out of harbor

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Park boat at loading dock

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Manually shift engine into gear

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate the ability to anticipate all line/fender needs and placements for every docking scenario (ex. Stacking in front of the ferry, super low tide at Manele, new dock with boat on the north side etc.)

## Training Portal Lessons/Clinics

Naturalist 300 Series

302 Coastal Processes

303 Advanced Invertebrate Biology

304 Oceanography

Complete 1 cultural narrative section (ex. DL series)

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Marlin Spike 301 Clinic

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Advanced Sailing Clinic

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Boat Handling (docking and sailing)

## Exam

Pass Jr 1<sup>st</sup> Mate Exam



## 1<sup>st</sup> Mate

Responsibilities: Ability to step in and fulfill basic duties of the captain in the event the captain is incapacitated, Takes the lead in managing crew and facilitating the trip,

### Learning Objectives:

- Ability to perform all tasks and duties of lower ranks in addition to the following:
- Expertise in navigation & piloting, including proficiency in using electronic navigation systems & radar.
- Knowledge of marine regulations and laws, including customs and immigration requirements.
- Mastery of all aspects of boat operations, including seamanship, navigation, and safety protocols.
- Strong interpersonal skills, including diplomacy, conflict resolution, and effective communication with passengers, owners, and other stakeholders.
- Becoming a trainer, demonstrating ability to teach, mentor and manage crew of all levels

### Skills Checklist:

#### Mariner

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate proficient boat handling without instruction  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate proficient use of navigation electronics  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrate familiarity with navigational aids and hazards in tour perimeter (knowing what the L buoy means, knowing where the Atlantis storm buoy is)

#### Maintenance

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ 10 maintenance hours  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Engine Checks  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Score\_\_\_ Date\_\_\_ Capt\_\_\_ Oil Change x2  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Line Replacement (ex. Halyard replacement)  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Basic Ding Repair (cosmetic fiberglass work)  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Assist in running a prep day (planning and execution)

#### Knots

- Score\_\_\_ Date\_\_\_ Capt\_\_\_ Proficiency in 3 strand splicing  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Whipping/Hot Knife

#### Training Portal/Clinics

- Completed all available cultural narratives  
Score\_\_\_ Date\_\_\_ Capt\_\_\_ Be able to give advanced fafas on a specific element of each trip (ex. Puhupehe)

# Senior 1<sup>st</sup> Mate

Responsibilities: Able to 1<sup>st</sup> Mate all boats, slips, and trips in the Trilogy lineup. Able to facilitate safety and training clinics. Able to train and mentor lower ranking crew. Pursuing opportunities for advanced skills and career development.

## Skills Checklist:

Ability to perform all tasks and duties of lower ranks in addition to the following:

### General

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Complete understanding of safety procedures and protocols

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Ability to lead and manage the deck crew and logistics team

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Ability to oversee the overall maintenance and upkeep of the vessel.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Ability to develop and implement operational plans, including budgeting, scheduling, and resource allocation.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Familiarity with international maritime regulations, standards, and best practices.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Active engagement in professional networks and industry associations.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Proven track record of leadership and management in the marine industry, including experience in multiple roles and settings.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Exceptional communication and problem-solving abilities, including the ability to handle emergencies, unexpected situations and crew management

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Demonstrated dedication to safety, quality, and customer service, including a passion for delivering extraordinary experiences to guests or clients.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Skilled in leveraging technology and data analytics to optimize boat performance, improve efficiency, and reduce costs.

Score\_\_\_ Date\_\_\_ Capt\_\_\_ Visionary and inspirational, with a clear and compelling vision for the future of the boat and the crew.