



Trilogy Crew Skills Development & Rank Promotion Program

Revised 4/2024

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 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 3rd mate. Completion of the 3rd mate checklist leads to promotion to 2nd 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 Captain. Crew will be evaluated and given a "pass" or "fail".

Crew members must earn a "pass" 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 1st 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.

General

	Date	Initial
<input type="checkbox"/> Free dive to 15ft	_____	_____
<input type="checkbox"/> How to check the CO2 system	_____	_____
<input type="checkbox"/> Switch out the CO2 on the soda machine	_____	_____
<input type="checkbox"/> Pumping out	_____	_____
	Slip 62	_____
	West Side	_____
<input type="checkbox"/> Sell logo wear using square app	_____	_____
<input type="checkbox"/> UKG clock in / out process	_____	_____
<input type="checkbox"/> Look up menu item ingredients on trilogyportal.com	_____	_____

Mariner

<input type="checkbox"/> Demonstrate proficiency securing a boat in a slip	_____	_____
<input type="checkbox"/> Properly secure mooring lines for end of day tie up	_____	_____
<input type="checkbox"/> Docking Procedures: hand signals and accurate numbers*	_____	_____
<input type="checkbox"/> Skiff Handling – South Side	_____	_____
<input type="checkbox"/> Skiff Handling – West Side	_____	_____
<input type="checkbox"/> Demonstrate proper cleating to a dock	_____	_____
<input type="checkbox"/> Properly coil and toss a line	_____	_____
<input type="checkbox"/> Snorkel gear setup	_____	_____
<input type="checkbox"/> Galley setup (without assistance)	_____	_____
<input type="checkbox"/> Hoisting and dropping main sail procedures*	_____	_____
<input type="checkbox"/> Handling line on a winch	_____	_____
<input type="checkbox"/> Furl and unfurl a headsail	_____	_____

Safety**Date****Initial**

- Setup and breakdown the O2 and AED
- Quarterly drills
- Beach loading*
- Location and use of all fire suppression equipment
- Understand proper sanitation procedures
(heads, snorkel gear, food service etc.)*

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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.

T I Date _____ Capt _____ **T II** Date _____ Capt _____ **T III** Date _____ Capt _____

T IV Date _____ Capt _____ **T V** Date _____ Capt _____ **T VI** Date _____ Capt _____

T VII Date _____ Capt _____ **Hulopoe** Date _____ Capt _____

Knots**Date****Initial**

- Bowline
- Cleat hitch
- Clove hitch

_____	_____
_____	_____

Training Portal Lessons/Clinics

- Learning Maui's Wind and Waves
- Deckhand Handbook
- Fully complete one cultural narrative section (ex. DL series)

_____	_____
_____	_____
_____	_____

Exam

- Pass Deckhand Exam
- Food Handlers Card
- Liquor Card

- Hawaiian Boaters Card
- 1st Aid/CPR Certification
- 4 Hours of Volunteer Time

3rd Mate

Responsibilities:

Independently conduct basic crew functions under the direction and guidance of the captain and 1st 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 – the idea that there is always something to be done

Mariner	Date	Initial
<input type="checkbox"/> Lead raising and lowering main and jib sails	_____	_____
<input type="checkbox"/> Describe the different points of sail	_____	_____
<input type="checkbox"/> Properly tension overnight lines, with consideration for the change in tide	_____	_____
<input type="checkbox"/> Bottom Scrub	_____	_____
<input type="checkbox"/> Know location and be able to describe the function of bilge pump and float switches	_____	_____
<input type="checkbox"/> Discuss reefing, when and why its needed	_____	_____
<input type="checkbox"/> Turn on/off Cabin lights at breaker	_____	_____
<input type="checkbox"/> Turn on/off Navigation lights at breaker	_____	_____
<input type="checkbox"/> Turn on/off the batteries	_____	_____
<input type="checkbox"/> Turn on/off inverter & Generator and know what equipment cannot run when generator is off depending on boat	_____	_____
<input type="checkbox"/> Hook up to shore power and be able to verify the boat is charging	_____	_____

Training Portal Lessons/ Clinics

- Naturalist Lecture Series 101 Fish ID & Ecology 102 Whale Naturalist
- 103 Sea Turtle Biology 105 Invertebrate ID & Ecology 106 Marine Mammals

Beach loading Clinic Date _____ Capt _____

Lifeguarding Clinic Date _____ Capt _____ Freediving Clinic Date _____ Capt _____

Complete one cultural narrative section (ex. DL series)

Fafa's	Date	Initial
Give Cultural Narrative	_____	_____
Give Island talk	_____	_____
Give Fish talk	_____	_____
Lead Snorkel Tour	_____	_____
Short Whale Talk (ex. Abbreviated whale talk for snorkel and sunset trips)	_____	_____
Observe Beach Check-In and briefing with 1st Mate	_____	_____

Exam

Pass 3rd Mate Exam

Lifeguard Certification

2nd Mate

Responsibilities:

Independently conduct crew functions under the direction and guidance of the captain and 1st 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 ie. Replacing bilge switches
- 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

General	Date	Initial
<input type="checkbox"/> Fuel from Slip	_____	_____
<input type="checkbox"/> Fuel from Fuel Dock	_____	_____
<input type="checkbox"/> Able to Identify and Inspect Zincs	_____	_____

- Take apart and assemble head _____
- Raise and lower Anchor SOP _____
- Check-in guests, amend manifest,
accept square payment for walk-up guests _____
- Understand basic snorkel gear repair _____
- Be able to PROPERLY order prep _____
- Completed Dinner Sail Chef Training _____

Mariner

Date

Initial

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

Safety

Date

Initial

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

Knots

Date

Initial

- Sheet bend _____
- Stopper Knot _____
- Square Knot _____

Training Portal Lessons / Clinics

Date

Initial

- 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)
- Marlin Spike 201
- Anchoring Clinic

_____	_____
_____	_____

Fafa's

Date

Initial

- Give Site Briefing x3

- Snorkel 101 x3

- Complete solo check-in and beach briefing Kaanapali

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Exam

- Pass 2nd Mate Exam

Jr 1st 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:

- 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.

General

Date

Initial

- | | | |
|--|-------|-------|
| <input type="checkbox"/> Be able to complete alcohol counts | _____ | _____ |
| <input type="checkbox"/> Be able to complete log counts | _____ | _____ |
| <input type="checkbox"/> 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) | _____ | _____ |
| <input type="checkbox"/> Demonstrate proficiency in helm connect (ex. Logging maintenance tasks, checking tasks off once completed) | _____ | _____ |
| <input type="checkbox"/> Understand what chemicals are appropriate for different surfaces/uses | _____ | _____ |
| <input type="checkbox"/> 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.) | _____ | _____ |
| <input type="checkbox"/> Shadow a 1st Mate or Senior 1st Mate training a new crew | _____ | _____ |

Maintenance

Date

Initial

- | | | |
|--|-------|-------|
| <input type="checkbox"/> Engine Checks x2 | _____ | _____ |
| <input type="checkbox"/> Oil Change x2 | _____ | _____ |
| <input type="checkbox"/> Demonstrate proper VHF communication (calling in/out of Harbor, boat to boat communication on 16) | _____ | _____ |
| <input type="checkbox"/> Understand appropriate radio comms for emergency situations | _____ | _____ |

Safety

Date

Initial

- | | | |
|---|-------|-------|
| <input type="checkbox"/> Lead Fire Drill | _____ | _____ |
| <input type="checkbox"/> Lead Man Overboard Drill | _____ | _____ |

- Lead Abandon Ship Drill _____
- Lead Medical Emergency Drill _____

Mariner

Date _____

Initial _____

- Correctly set and trim sail _____
- Going aloft and rigging inspection (Bosun Chair) _____
- Position boat for end of the day tie up _____
- Pull boat out of harbor _____
- Park boat at loading dock _____
- Manually shift engine into gear _____
- Demonstrate the ability to anticipate all line/fender needs and placements for every docking scenario _____

Training Portal Lessons / Clinics

Date _____

Initial _____

- Naturalist 300 Series _____
- 302 Coastal Processes _____
- 303 Advanced Invertebrate Biology _____
- 304 Oceanography _____
- Complete 1 cultural narrative section (ex. DL series) _____
- Marlin Spike 301 Clinic _____
- Advanced Sailing Clinic _____
- Boat Handling (docking and sailing) _____

Exam

- Pass Jr 1st Mate Exam

1st 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: those listed in the COI; marine sanctuary; manning requirements, rules of the road, aids to navigation
- 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

Mariner

Date

Initial

- Demonstrate proficient boat handling without instruction
- Demonstrate proficient use of navigation electronics
- Demonstrate familiarity with navigational aids and hazards in tour perimeter – #2 buoy outside Manele; bathymetry along the Pali

Maintenance

Date

Initial

- 10 maintenance hours
- Engine Checks
- Oil Change x2

- Line Replacement (ex. Halyard replacement)
- Basic Ding Repair (cosmetic fiberglass work)
- Assist in running a prep day (planning and execution)

Knots

Date

Initial

- Proficiency in 3 strand splicing
- Whipping/Hot Knife

Training Portal Lessons / Clinics

Date

Initial

- Completed all available cultural narratives
- Be able to give advanced fafas on a specific element of each trip (ex. Pu'upehe)
 - Discover Molokini
 - Discover Lana`i
 - Discover Ka`anapali
