**KIMBERLY BROWN** 

# CHECKLISTS FOR SALDAT MAINTENANCE

PASSAGE PLANNING, SAILBOAT MAINTENANCE, CLEANING, MEDICAL, & MORE

# SAMPLE

BOAT BRIEFING CHECKLIST Basics: getting on and off the boat safely. Moving around: what you can walk on, hold onto, and clip to.  $\square$ Deck hazards: shoe policy L <sup>and</sup> other hazards Engine ...

# **Checklists for Sailors - SAMPLE**

Passage Planning, Sailboat Maintenance, Cleaning, Medical, & More

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Note to reader: I would like to take a moment to apologize for any typos, misspellings, or grammar mistakes that may appear in this book. While I have done my best to ensure the text is error-free, sometimes mistakes slip through the cracks.

I understand how frustrating it can be to come across errors in a book, and I want you to know that I take this issue seriously. I have made every effort to minimize mistakes and ensure the highest quality in my writing, but I am only human, and errors can happen. So please look past any mistakes you may find and enjoy the content of this book. Thank you for your understanding and support.

#### Other Titles:

- VHF Radio Reference Guide for Sailors
- Sailboat Buying Guide for Cruisers
- Boat Safety Manual & Safety Checklists for Sailors
- A Sailing Cruiser's Guide to Making Money
- Hurricane Survival Checklist for Sailors
- Changing Lifestyles: Trading in the Rat Race for a Sail Around the World

### Five Star Reviews from Readers

#### Leggett Family

"My husband is in the Coast Guard, and we're buying our first catamaran. But I am on the other spectrum of sailing; it's all so new. So having a checklist to reference and guide me through the process is very comforting. Checklists for Sailors are a great resource for creating onboard checklists for systems and routines."

#### Jennifer C

"Checklists for Sailors is a great resource—comprehensive lists for everything you can imagine on a boat. Start with a list and customize it for your boating situation and needs. No need to start from scratch!"

#### Jeff Pickens

"Lists, reminders, and checklists have served me well for most things in life and owning and operating a sailboat can seem daunting at first view— the author has put together a wonderful set of checklists based on years of her sailing experience with the contribution of collective knowledge from others. It's a unique book that probably gets put together in various versions by most folks in ample time, but what an advantage to have this tool before one sets out to sea! I put the lists into the Microsoft To-Do app, allowing users to assign timeframes for each task (daily, weekly, or monthly). Then, as things are accomplished, the bullet can be pressed and the job "completed," like a grocery list. It then reappears at the re-assignment time, and the tasks can be repeated fresh. Her other checklist book, VHF Checklists, is beneficial and vital regarding radio protocol and process. Both books are valuable tools I sincerely appreciate— I am grateful for the author's efforts."

# Five Star Reviews from Readers (continued)

#### Greg Clum

"As with other books Kim has published, this is a fantastic resource. Even if you've been sailing for a long time, this is a great book to help you recheck and organize. Very much worth the price paid in both knowledge gained and just fun to review and get better organized!"

#### A Braider

"I particularly like the range of checklists, from provisioning to maintenance to passage planning. It will be handy, especially to tailor the lists to our needs."

#### Lucy

"I'm so happy to have found this book! We just bought a cruising sailboat, and I began to feel overwhelmed by all the things you have to know to maintain a boat. This book helps with that! The checklists in this book are so detailed and can easily be customized to make them useful for different boats/circumstances. The checklists cover many essential topics: passage making, medical lists, cleaning both topsides and below deck, and provision, to name a few. I'm still learning my boat and will continue to use and customize these checklists and maintain them in our boat book. Thank you for writing this book!"

#### Mark Redmond

"As a new sailboat owner, I found this book a must-have. I have reviewed all the supporting manuals for the boat, so having one go-to support document is advantageous. Buy, use, and have peace of mind."

#### Arnold Heins

"As a Yacht Captain of a large motor vessel, I fully appreciate the value of a checklist to get the job done, stay safe, and save money."

## Five Star Reviews from Readers (continued)

#### Shelley Joyce

"An incredible resource. I have learned so much from these guides already. And I have added many things to my "to-do" list to ready ourselves for cruising life. Incredibly grateful for the extensive and well-thought-out checklists. I plan to integrate them with my own—and benefit from the years of sailing experience and expertise that Kim and Sailing Britican offer."

#### Nabil Alanbar

"As an engineer, pilot, and sailor, I LOVE a good checklist and was surprised there were so few books like this. I am glad to have found this one."

#### Sailing Blown Away

"Exactly what we needed; the lists and the commentary are incredibly straightforward and helpful—well done!"

#### **Guy Barton**

"Checklists for Sailors is an excellent resource for anyone serious about sailing safely and looking after their boat and equipment. Immensely practical and born out of experience."

#### Dominic Liddell

"I have been trying to create the ultimate electronic checklist for my boat and found that my thought process would dry up or jump around to the extent that there was much thinking and a little writing. So I bought the whole set of checklists and cruising guides on special, which are a great read. They offer insights into the reasons for the checklist and its items. I can now start ordering them how I want, knowing Kim and Simon have thoroughly researched the process. Great job!"

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# What's New in the Latest Version

In this newest Edition, the 3<sup>rd</sup> Edition, here's what's new:

- How to Prevent Boating Failures 7 Reasons Why You Need Checklists
- How To Create and Customize Checklists
- Boat Safety 7 Core Components
- UPDATED A Z Sailing Passage Checklist
- NEW Long Sailing Passage Checklist
- UPDATED Anchoring Checklist
- NEW Mooring Ball Checklist
- NEW Med or Stern-to Mooring Checklist
- NEW How to Leave a Dock Checklist
- UPDATED Packing List for Friends, Family, and Crew
- UPDATED Engine and Ancillary Checklists
- NEW Electrical System Audit and Troubleshooting Basics
- NEW Rigging Checklist
- NEW Fresh Water Drinking Systems Checklist
- NEW Boat Safety Checklist
- NEW Propeller Servicing Checklist
- NEW Beach BBQ Checklist
- NEW Long Passage Meal Planning
- NEW EXTRA Passage Planning the Modern Way
- NEW UPGRADE OPTION Video Library (demonstrating 35 different checklist topics)

When you purchased *Checklists for Sailors*, you also gained access to the fully customizable **Microsoft Word version.** As you can imagine, checklist items are a very personal thing. For example, one skipper might like to check the engine first and then do the generator; another might want to do the opposite.

# How to Prevent Boating Failures

Preventing boating failure comes down to several critical pieces of paper. The mighty checklist is the secret weapon boaters use to combat engine issues, leaks, rigging failures, and everyday boat problems.

Using checklists on your boat will be a smooth transition if you've used them in your previous professional or home life. But some cruisers need to remember the benefits of using checklists. They get on their boat and 'wing it' rather than create routines and procedures that enable a happy running boat.

Sure, boat life is all about going with the flow and being adaptable and flexible. It's about throwing some caution to the wind and finally allowing your spontaneous and carefree lifestyle to present itself. But, of course, the last thing you're thinking about is how to prevent boat failure!

Back home in your land-based life, you had deadlines, appointments, due dates, structure, routines, rules, and restrictions. That's not what you want on a boat. You want freedom. You want the space to do what you want to do when you want to do it. And that IS what a sailing cruiser's life is all about, but there are exceptions.

Boats are mechanical.

They're also living in the harshest conditions on Earth. Anything surrounded by saltwater is in a constant state of perpetual decomposition. However, with proactive servicing, things will succeed. For example, if you properly service your engine routinely, doing the same tasks simultaneously every week/every passage, it's more likely to run well.

And let me assure you, if it's going to stop working, it's usually in the worst spot, like the entrance of a marina or between two reefs!

What else? Humans are imperfect.

Being a boat owner requires a humongous amount of working memory. Without a set of reminders, it's possible to miss one or many critical steps while maintaining and operating a boat.

For example, a simple day out sailing consists of planning, working backward to ensure preparations for the plan is possible, and then working the plan.

You must check the weather, understand the tides and sea state, plan a passage, do the engine checks, and rig checks, ensure safety systems are operating correctly, brief any crew or guests on what the day involves, provide food and drinks are already prepared or easy to prepare, safely leave your current location, and this is before you even set sail!

And note that you're not even considering how to prevent boat failures.

I want to avoid coming across as cruising life is stressful. Cruising life is fantastic. Getting the sails up, turning the engine off, and allowing the boat to slice through the deep blue sea is magical. The warm breeze on your face, feeling the sun on your skin, and looking out at various amazing landscapes is priceless.

But that's the reward for much hard work!

So, how do checklists help a sailing cruiser to prevent boat failure?

#### 1. They will help you stay more organized by ensuring you complete all the steps.

For example, before every voyage, it's essential to check the engine water, oil, belts, and batteries, look for leaks, secure electrical systems, and clean the filters. You also want to ensure you can see the exhaust when you start the engine. Skipping any of those steps could prove disastrous.

#### 2. Checklists are motivational.

When you have a set procedure to follow, you'll feel compelled to do it. If you put fun systems in place, you'll be more likely to do them.

There is nothing sweeter than ticking off a checklist!

# 3. Checklists will allow you to complete repetitive tasks more quickly and efficiently with fewer mistakes.

For example, quite a few steps are involved in wintering a boat or putting it up on the hard. Since this task is done infrequently – perhaps once a year or every several years it's essential to follow all the steps.

Ensuring that cockpit and deck drains are left open is imperative.

If drains are closed, the boat can flood. Unfortunately, boat flooding happens too often – a boat owner leaves his boat on the hard, the cockpit fills up with rain, floods the engine, and ruins the interior.

#### 4. Another benefit of having boat checklists is clarity.

Checklists mean fewer fire drills and less stress helping you to think more clearly. For example, when we affix to or leave a mooring ball, we use a very set procedure. We do the same thing every time.

By following our checklist, when issues arise, we're more prepared for them. We are clear about what's wrong and can usually be creative and quick to find a solution. Since we follow a checklist, we can also analyze what went wrong and determine if there is something we can add or remove from our list to improve the procedure.

#### 5. Checklists enable easier delegation.

We can delegate jobs quickly and easily during our week-long experiential sailing cruiser charters by supplying checklists. We have a variety of lists to hand our guests so they can not only help to prepare/maintain the boat but also learn what it takes to keep a boat in good shape.

Some of the checklists we delegate include engine checks, pre-passage checks, after-passage duties, rigging, safety system checks, anchoring/mooring, taking the dinghy to land, and daily cleaning duties.

We always walk our guests through a checklist the first time. After that, allow them to follow the list to understand the process clearly. It helps our guests learn the sailing cruiser life and frees time for us to do other tasks. Having a variety of checklists is excellent for children, too – it allows them to follow along and feel included.

#### 6. Checklists can ultimately save lives in addition to preventing boat failures.

We have a variety of safety checklists ensuring that we keep on top of our life-saving equipment. Every year at the same time, we collect all our flotation devices (life jackets, life raft, down buoy), have them tested, and inspect every safety device on our boat. With a reminder boat safety checklist, we can properly understand the state of our life-saving devices.

#### 7. Checklists allow for continued improvement.

We often add a new step or find an alternative way of doing something. Having a set checklist makes it easy to insert something new and hit the ground running. For example, we have a spare parts checklist outlining all the necessary parts.

If we use something in our spare parts list, we do our best to replace it quickly. Since we've been sailing since 2014, that list has grown.

Checklists will help you to become more organized and motivated to get things done, get things done quicker and more efficiently, have more clarity, delegate, save lives, and continually improve. So, let's move on to creating and modifying checklists best suit your needs.

# Passage Planning Preparation Checklist Introduction

The *Passage Planning Preparation Checklist* enables sailors to gather all the necessary data to complete a passage plan.

Critical tasks include understanding the weather report, calculating the amount of daylight, analyzing the sea status, and studying the tides. Another vital area is the consideration of alternative ports. What other options do you have if you can't get to where you want to go?

On several occasions, we set off heading to one destination only to end up in an entirely different location due to weather or unfavorable sea conditions.

One time while sailing from Gibraltar to Malta (a 900+ nautical mile journey), we had to seek refuge in Algiers, Algeria, Northern Africa. After twelve hours of unexpectedly getting caught in a Force 8 to 10 storm with a ripped sail, we grew weak from a lack of sleep, seasickness, and all the energy it took to keep the boat going.

Thankfully, Algeria officials welcomed us within hours of making a VHF call to the harbor – one of two potential planned refuges.

Often the weather forecast doesn't reflect current conditions, or you'll arrive at a destination and discover it's unsuitable. Flexibility, patience, and trial and error are part of the passage planning process.

Once you've covered the items in your *Passage Planning Preparation Checklist*, you can use the *Passage Planning Checklist*.

# Passage Planning Preparation Checklist

Gather all the tools necessary to create a passage plan

Up-to-date charts Pilot book Almanac Tidal stream atlas Pencil, course plotter, and dividers Weather report Ipad

Determine a potential passage and consider

Weather report

Amount of daylight (sunrise and sunset times) and note time constraints

Crew capabilities

**Boat capabilities** 

Departure pilotage (any restrictions or limits?)

Arrival pilotage (any restrictions or limits?)

Check tidal highs and lows

Consider a potential route using tidal streams, gates, and navigational aids

Note shipping lanes and traffic separation schemes

Estimate the duration of the trip considering the distance, sea state, wind, and route

Tides - Spring/Neap/Interpolate? Tidal heights at departure and destination

Note possible refuges

Get the complete guide for the rest of this checklist and a customizable MS Word version!

# **Boat Briefing Checklist Introduction**

The *Boat Briefing Checklist* is a comprehensive list to help you, or your skipper, introduce your boat to visiting family, new guests, and crew.

The list covers core equipment, systems, and procedures on deck and below – what they are and how they work. The list allows for a good discussion on safety devices and emergency procedures. Furthermore, it provides an opportunity to discuss medical issues and highlight the importance of everyone looking out for each other.

You may have people on board that have yet to be on boats. They may not understand how the toilets or drainage pumps work, why they should wear shoes when walking on deck, or the seriousness of an injury.

Guests need to know that calling 999 or 911 won't necessarily get a response in minutes – it could be hours and sometimes days.

By using the *Boat Briefing Checklist*, you'll be able to cover several major areas. For example, having discussions about the way things work, you'll be less likely to be put in a position where you or your skipper is pulling a wet wipe from your dismantled toilet macerator, taking a guest to emergency due to dehydration, or someone dying because somebody didn't cover the Man Overboard (MOB) procedure.

Remember that this *Boat Briefing Checklist* is an example of what you can cover. Some areas might be more or less important to you. Take things out and add others. Make this document work best for you and your boat.

# **Boat Briefing Checklist**

Up on deck

**Basics:** getting on and off the boat safely.

Moving around: what you can walk on, hold onto, and clip yourself to (jackstay).

**Deck hazards:** shoe policy, hatches, boom, and any other hazard area.

Lines and winches: basic use and dangers to be aware of.

**Lockers:** where they are and the contents (Fender storage, cleaning supplies, safety equipment location, and gas).

Tender: how it's used.

Engine: turning it on/off and how to operate it. Emergency turn-off.

Instruments and GPS: a quick overview.

Teamwork: report any injuries, breakages, concerns, or illnesses immediately.

Sun protection: hats and sunscreen.

**Hydration policy:** everyone must be seen drinking water throughout the day.

Sea sickness: symptoms, ways to avoid it, what to do if you get it.

**Medical:** Medical questionnaires filled out? Ask crew: Any allergies? Is anyone that can't swim? Medical conditions? Food allergies? Diabetes, epilepsy, heart condition, etc. Discuss each other's medical status and medication.

#### Emergency equipment

**Man Overboard (MOB):** the purpose of the equipment, MOB procedure, MOB buttons/alerts, life raft, etc. Note: if you do fall in, go into a fetal position.

**Other emergencies:** What to do in the case of a demasting, fire, flood, or loss of the rudder/steering.

Get the complete guide for the rest of this checklist and a customizable MS Word version using the link in the footer.

# **Routine Engine and Ancillary Checklist Introduction**

What items on a boat need to be maintained or serviced? Of course, the most important is the heart of your boat, the engine. When we started, we outsourced everything, including anything to do with our engines, even routine servicing. We knew how to check the engine before a passage (oil, water, belts, etc.), but that was it.

Taking the time to learn how to routinely service our main engine and generator, in addition to doing the more comprehensive yearly service, not only saved us money but gave us confidence that we were doing things correctly.

Furthermore, we often knew how to diagnose the issue when something on the engine went wrong. If you need more time around engines, hire a marine mechanic, and have them walk you through a routine and comprehensive service so that you can do it yourself.

Within the engine checklists within this guide, I offer lists for pre-passage engine checks, checks while running on passage, monthly, yearly, every 500 engine hours, and every 1000 engine hours.

Please keep in mind that these checklists are suited to our boat. If you still need a service manual for each engine, search for them online. The service manuals will explicitly state when you should carry out core activities for your specific engine.

As a side, engine servicing checklists exclude ancillary items that are important. For example, our Perkins Service Manual does not include the required task of checking and changing the engine anode. Further, it doesn't cover anything outside the engine, like the drive assembly or steering functions, even though those items are part of the overall process.

# **Routine Engine and Ancillary Checks**

Before using the main engine and generator

- □ Water check the water level
- □ Oil check the oil level
- □ Batteries ensure batteries are charged and are charging
- □ Belt make sure the tension is correct
- □ Leaks look for water, oil, or fuel leaks
- □ Electrics survey the engine area for any loose connections
- □ Strainers ensure all water strainers are devoid of debris
- □ Visually inspect racors (fuel/water separator)
- □ Fuel level

#### While running the main engine/on passage

- □ Inspect the engine every three hours
- □ Rotate the stern gland every eight to 12 hours when motoring
- □ Rudder-bearing greaser every week
- □ Periodically look at strainers
- □ Fuel level

Monthly or after X hours of use (Routine service)

- □ Check all fuel lines for wear or chafe
- □ Change engine oil
- □ Replace oil filter
- □ Check anode
- □ Check engine mounts

Get the complete guide for the rest of this checklist and a customizable MS Word version using the link in the footer.

# **Cleaning Checklists Introduction**

After you buy a boat, you realize that more than anything else, you clean, clean, and clean. You clean before you go anywhere. You clean while journeying, and you'll clean once you arrive.

There's so much to clean that seeing the wood through the trees is often tricky. Mostly, we clean things when they need it. For example, if something gets salt water on it or starts to smell (grey water tank, bilge, toilet), we get clean!

Some items might be new for you on the cleaning list. For example, do you clean your antisiphon valves yearly? It took me ages to figure out what they were, how to find them, and how to clean them. If an anti-siphon valve fails, water can enter the boat if the thru-hull goes underwater (like when leaning while sailing). Not good.

And what about your winches? They need servicing and cleaning at least every year. You won't believe the difference it makes to servicing them.

The first cleaning checklist within this guide is everything to clean above the deck. When we're out sailing and return to a marina with fresh water, we spray down everything above the deck. That means we wash down the stainless steel, the rigging, the hull, the davits, the cockpit – everything. Then, we use a light detergent, soft brushes/clothes, and chamois to polish everything up.

Salt and UV rays slowly destroy everything. So, after a voyage, the goal is to clean off anything that gets wet with salt water as soon as possible. For protection against UV rays, use covers – hatch, winch, grill, windlass, and electronics covers, to name some.

# Cleaning Checklists Introduction (CONTINUED)

At anchor or on a mooring, it's a different story, as we don't have an unlimited water supply. So instead of washing everything, we wash the spray hood, take a chamois, wipe the salt off all the steelwork, and clean the hatches/windows with fresh water.

We tend to anchor for a month and then go into a marina for a few days. Whenever we go to a marina, we spend a lot of time cleaning and servicing everything we can.

What about down below?

It's up to you to decide when you want to clean things. I listed items that need to be cleaned more regularly at the top and those that only require a wash yearly towards the bottom. Go through and decide what's right for you.

Also, consider creating a monthly cleaning calendar to spread out cleaning jobs. When you break the cleaning tasks down to a little every day, it's manageable.

# **Cleaning Everything Below Deck**

#### General

- □ Floors weekly
- □ Walls monthly or whenever mildew or mold appears
- Headlining monthly or after a guest leaves a particular room
- □ Bilges every couple of weeks or whenever it starts to smell
- □ Fittings and fixtures monthly
- □ The crew covers monthly or when something gets spilled on
- □ Upholstery whenever needed
- □ Cushions whenever needed
- □ Curtains whenever needed
- □ Lee cloths whenever needed
- □ Engine compartment once a month
- □ Anti-siphon valves yearly
- □ Fresh water tank yearly

#### Heads

- □ Floors, walls, ceiling/headlining every week
- □ Sink, shower, and toilet when needed
- □ Vinegar poor down the toilets every couple of weeks or whenever leaving the boat
- □ Muriatic Acid use once a month in the toilet
- □ Sink/shower strainers clean out when needed
- □ Secondary strainers open and clean them out
- □ Heads odor filter replace once a year
- □ Black water tank flush every month or whenever in a marina

Get the complete guide for the rest of this checklist and a customizable MS Word version using the link in the footer.

# The First Aid Kits

You'll have different requirements depending on where you're sailing, who's on board, and how long you'll be at sea. Considering that we intended to sail worldwide, we purchased a substantial First Aid package.

We have items to cover the basics, like cuts, burns, fractures/breaks, allergic reactions, and dental issues. We also have the tools to observe a casualty with a stethoscope, blood pressure cuff, and an otoscope to check ears.

Also, we have a particular medicine that stops the bleeding of an artery recently discovered and used in the Gulf War. Finally, we have a treatment to prevent secondary drowning.

Secondary drowning is a dangerous complication of a drowning close call that can develop 24 to 48 hours after the incident. It happens if water gets into the lungs. It can irritate the lungs' lining, and fluid can build up, causing pulmonary edema.

We also carry medicine to combat meningitis. In addition, we had a defibrillator when we crossed the Atlantic Ocean, as we found a good deal on eBay.

When we head into the Pacific, we'll purchase needles, saline bags, and any other items we might need to give doctors in third-world countries. At least we can supply a clean kit for ourselves. At least, that's the idea.

The scary thing about illness or injury at sea is that it could be hours and even days that we might have to keep someone alive before we can get professional help. We might have a situation where we must call for Medical Radio Advice, and the doctor will ask, 'what do you have on board?' and then tell us what to do.

# The First Aid Kits (continued)

If my husband, daughter, or any of our guests need lifesaving help, I want to be able to supply the best assistance, use the correct tools, and have access to the medicine I need.

So, check out the *First Aid Kit* and the *First Aid Day Trip Kit* lists (in the complete version) and change them according to your needs and situation. Also, in this complete guide there is an 'Extra Section,' where I've included our exact contents in our elaborate First Aid package. We sourced our package from England, so you might have to look up the medicine names for alternatives in other countries.

# The First Aid Kits

#### General

- □ Assortment of plasters/Band-Aids
- □ Non-stick dressings a variety of sizes
- □ Bandages a variety of sizes and lengths
- □ Adhesive tape
- □ Non-latex gloves
- □ Alcohol-free moist wipes
- □ Scissors, safety pins, and tweezers

#### Topical or external treatments

- □ Anti-septic cream and or spray
- □ Antibiotic cream
- □ Hydrocortisone ointment
- □ Burn gel or ointment
- □ Calamine lotion
- □ Eyewash
- □ Eardrops
- □ Anti-fungal ointment
- □ Local anesthetic gel

#### Medicines

- D Painkillers: Aspirin, Ibuprofen, Acetaminophen
- □ Antihistamine: Allergy, allergic reaction, bug bites
- □ Antibiotics: two types of broad-spectrum

Get the complete guide for the rest of this checklist and a customizable MS Word version using the link in the footer.

# Why Wait?

*Checklists for Sailors* is the perfect guide for anyone who wants to ensure they don't forget any important steps before setting sail. It's like having a personal assistant, but without the eye-rolling when you forget something for the umpteenth time.

Think of it this way: with the help of these checklists, you'll never have to worry about setting off on a voyage without unplugging from the dock electrics or forgetting your favorite pair of sunglasses. And if you're the type of sailor who enjoys a good prank, you can even add your own items to the checklist, like "Make sure Captain doesn't forget to wear pants" or "Double-check that the rum supply is fully stocked."

But in all seriousness, *Checklists for Sailors* is a great resource for ensuring a safe and enjoyable sailing experience. Plus, if you're anything like me, you'll find great satisfaction in ticking off each item on the list, giving you a sense of accomplishment that rivals catching that elusive big fish. So, what are you waiting for? Get your copy today and start checking those boxes!

