

SOCIETY OF ACCREDITED MARINE SURVEYORS® INC.



# SAMS® NEWS

Volume 26, Issue 1 Editor: Stuart J. McLea, AMS® Spring 2016



**SAMS®  
International  
Meeting &  
Educational  
Conference  
(IMEC)  
Oct. 26th  
To  
Oct. 29th  
2016  
Newport  
RI**

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Spring Has Sprung



**Stuart J. McLea SAMS®**  
**Editor/Past President**

**Good Day to you all, from the MUCH warmer North.**

This season's newsletter has changed a little or should I say improved. The last newsletter was a dry run on articles from guest writers and because of the very positive feedback, I have decided to do it again.

I have published four articles in this newsletter.

**George Stafford, SAMS®/AMS®** has provided an article on the review of the National Cargo Bureau, Inc., Securing of Non-Standardized Cargo, self-study course. This is in accordance with the International Maritime Organization, IMO, Annex 13, Code of Safe Practice for Cargo Stowage. George has taken the course and it is now a diverse income stream. This is a program that can be completed during the winter months when assignments are few. Thanks George Stafford for your contribution and your service to SAMS®. [\(Page 24\)](#)

**Ken Weinbrecht, SAMS®/AMS® and our Education VP** has written an article on Appraisals. This subject can be difficult and can get our members into more trouble. This is a must read for the seasoned Marine Surveyor and the new Surveyor Associates. Ken has done a great job in bringing lots of good information into layman's terms. [\(Page 20\)](#)

**Thor Jones, SAMS®/AMS®** and the Gulf Coast Regional Director has written an article on Project Cargo Surveys. There is a greater demand in the industry for surveyors with Project Cargo Experience. Thor's article is Project Cargo 101 and is a way a surveyor can diversify his or her income stream. [\(Page 18\)](#)

**Joe Derie, SAMS®/AMS® and Commercial Work Boat Chair**, has developed a quiz to test your knowledge of the Rule of the Road. The quiz is based on the USCG Rules of the Road, however our International friends may disagree with some of the answers. Do yourself a favor, take the quiz, but don't cheat by looking at the answers. Have some fun with it and take it to your local marina or yacht club. [\(Page 26\)](#)

Lastly, a thank you to **David Condino, SAMS®/AMS®, Master Mariner** for the link to the 1990 Marine Casualty Investigation and Fire aboard the passenger ferry Scandinavian Star. This 40 minute video provides an excellent overview of the damage survey and investigation of the tragedy where over 150 passengers lost their lives and three company officials including the Captain saw jail time. [Link \(Page 25\)](#)

I want to thank the above members for taking the time to share their knowledge and information for the betterment of our membership. The sharing of information is what SAMS® is all about and with knowledge comes power. I am still looking for articles for the next newsletter. If you have a topic that you want to share, please contact me by email [mclea@mrmsolutions.ca](mailto:mclea@mrmsolutions.ca). It would be nice to hear from you.

**DID YOU KNOW?** The Jacksonville office staff checks member's websites and advertising for policy violations. Take the time to read the SAMS® Policy on advertising on page 5 from the General Policy Manual.

**I hope to see you all in Newport, Rhode Island as it is shaping up to be a great meeting.**

**Lloyd Kittredge, AMS<sup>®</sup>**  
**President**



**SOCIETY**

Have you ever taken the time to look up the meaning of this short word?

Well I just did, and as expected there are several variations. One that really stood out does NOT fit us (SAMS<sup>®</sup>) at all. It is “a group of people of higher social class”. Ever look around the room and see what some of us feel is “casual business attire”, but let’s leave that alone. The one that does fit our Society is “a group of people organized for a common purpose”. The purpose and objectives of our Society is stated in the first section of our Bylaws.

I think it wouldn’t hurt to review them:

- A. to provide an organization complementary to the maritime industry,
- B. to cooperate and encourage communication among members,
- C. to cooperate and encourage communication between members and other marine organizations,
- D. to provide information and training for persons interested in the profession of Marine Surveying,
- E. to suggest standards for technical procedures for all members and others working in the field of Marine Surveying,
- F. to educate the public.

The last point is the one I would like to address in this article. As a whole, our members do an outstanding job of communicating with our clients on what we do and don’t do in our line of work. When you consider we may get between 12 and 20 complaints sent to our Corporate Office in Jacksonville a year, and I would estimate that 98% of them are a work product issue rather than one of an ethical issue. Give yourselves a pat on the back, you deserve it; however, if we would go one step farther when explaining to our clients just what we do and that would be to let them know that each of us is an entity in ourselves. We are self-employed and our Society exists for the development of the marine industry. One of the common ideas is that people think we are employed by our organization. If something happens to their boat after a survey has been done, they want SAMS<sup>®</sup> to pick up the bill. I am sure you have all heard of this. I believe that if we explain just what our Society means to them, that a lot of the misunderstanding could be avoided, and therefore save a great deal of time for your Corporate staff; and for the Executive Vice President. Please remember, he is a surveyor just like all of us and volunteers his time for the common good. As I have said many times communication is the key to avoid most of the misunderstandings.

I have not been to Goat Island in Newport, Rhode Island, however both my wife, Darlene and I are really looking forward to the IMEC on October 26<sup>th</sup> thru 29<sup>th</sup>. A really good price was locked in for the room rates and Rhea has told me that interest has been very strong. Get your reservation in for the rate before the block gets filled up. Each year we have members that don’t make the timeline and have issues with this. I also have been in communication, there’s that word again, with Kenny Weinbrecht, AMS<sup>®</sup> VP Education and he has most of the speakers already locked in. It looks like a strong educational program will happen again this year. If you need an IMEC meeting for your CE obligation, this looks like a great year to get it. I hope to see you there.

**Now, I’m back to work trying to make some dollars!**



**Robert Horvath, AMS®  
Executive Vice President**

## **Greetings from the not so Snowy Great Lakes**

This winter has really been mild, not that I'm complaining after the last two brutal winters. Hope everyone has had their surveying season extended.

We have not had many complaints so far this year, but the two of them that crossed my desk I found very interesting. In one the surveyor had himself working for the seller, whom happened to be the broker owner of the boat (HUMMMM). The second one had the wrong name of the buyer and stated he was present during the survey and sea trial which he wasn't (HUMMMM). I'm sure the attorneys would have a ball with those statements if these reports were used in court. Fortunately for both surveyors, it would appear that they resolved their problems by communicating with their clients. If I had to venture a guess, both of these surveyors did write - overs using reports of similar boats, not a good idea if you are not a really good proof reader. The two lessons I would hope these surveyors learned should be, that it pays to communicate and proof read, proof read. Remember once it appears in writing you are bound by it.

Another complaint we see too often lately, is not getting the report to the client in a timely fashion. I personally get my reports delivered within three working days. It should not take weeks to get a survey report to the client when it's been paid for already. OK, enough said.

Hope everyone is getting ready for Newport. I hear Ken Weinbrecht, AMS® has another excellent education program lined up. The room rates are great and the area is just packed with history.

**See You All in Newport !!!**



**George “Jim” Sepel, AMS<sup>®</sup>  
Membership Vice President**



**UP OR OUT?**

“HOW TO UPGRADE TO AMS<sup>®</sup> for DUMMIES”

Greetings from the warm Rain Forest of Southeast Alaska to my many colleagues and friends in SAMS<sup>®</sup>.

If you have ever tried to understand the previous UP/OUT Policy but, were easily confused, then welcome to my world.

*Most* of you AMS<sup>®</sup> members were eager to upgrade, and successfully did upgrade to AMS<sup>®</sup>. It’s just like the vast majority of you are “members in good standing”, you pay your dues, you do your CE’s, you attend IMEC’s, you help out your RD or your BOD at meetings and conferences, and you produce quality marine survey reports that meet our “minimum” recommended content. However, over the past several years we have noticed that there was an ever growing number of Surveyor Associates who literally waited until the last moment to *apply for upgrade*. In fact, we were seeing prior members who were tossed out for not upgrading, then re-applying for membership. We have had a few Surveyor Associates who literally have been Surveyor Associates for up to 12 years! How, could this happen?

Well the problem was fundamentally that the UP/OUT policy was not that well defined (**and we have recently revised and fixed this problem**).

Here’s an example:

**Old, prior system:**

Let’s say we admitted a new Surveyor Associate 2 on January 15, 2012. This meant we were giving the applicant *2 years of the required 5 years* of marine surveying experience. So, their “eligible upgrade date” was 1-15-15. But, sometimes that “eligible” to upgrade date got converted to a five year “must” upgrade date; and therefore, they were given an additional two years to upgrade. This was the confusing part. So, if you waited until 2017 to upgrade and didn’t qualify or didn’t file for upgrade, you were out. Or, if you were upgraded in 2017 and didn’t pass the test, then you had been an Surveyor Associates for 7 years (2012 to 2019).

**New system:**

1. Effective January 2016.
2. An Surveyor Associate 2 (example) gets three years to apply for AND BE APPROVED FOR UPGRADE.
3. So, if they were accepted as Surveyor Associate 2 on January 15, 2016; they must apply for and be approved as AMS<sup>®</sup> Candidate by 1-15-19. And, then they get 2 years to test and pass.
4. Furthermore, they should apply for upgrade within six months prior to their “must upgrade date” (in this case, by 7-15-18). So an Surveyor Associate 2 can apply for upgrade, 2.5 years after becoming an Surveyor Associate 2. If any Surveyor Associate waits until the last minute to upgrade, they may not be approved in time. In other words it can take the Membership Committee 30 to 45 days to approve your request. We really try to be thorough.
5. For anyone wanting an earlier upgrade (than the required six month period), they should discuss this with their RD and/or VP Membership.

The required Surveyor Associate annual report review is working. You should have no surprises when you apply for upgrade. AND, HQ should not have to remind you to submit that annual report.

AND, please note that the SAMS® Recommended Report Content also applies to AMS® members (for you old geezers and “geezerettes” out there).

You should also review the testing policy, it is more liberal on re-takes; and DO NOT WAIT until your time is up to test. The test is tough; but, you can learn from it and do better. You can take it up to 3 times, (in the 2 years as AMS® Candidate).

On a Marine Surveying note, yesterday Todd and I inspected a 50 year old steel seiner. Needless to say, it was an all day job for Todd, myself, and my son, Darin. While Todd was disconnecting the shore power cord, there was literally a “puff of smoke”...a fire was just beginning to smolder. Needless to say, the AC system was old and not up to standards. And, someone was “living aboard” this boat with household, ungrounded electric heaters providing overloads. We have come across “warm” cords and plugs before, but have never caught a fire in progress! One of the long-time crew members said: “I’ll go get a pig tail and rig it to the dock”. We, of course, explained to the crew why that was not a safe idea and recommended consult with a marine electrician.



EVERY MEMBER is supposed to know and follow our policies. So please don’t forget to read a page of the Policy Manual or re-read the Code of Ethics every night before you go to bed.

Next Board of Directors Meeting is in Chicago, this June. If you are in the neighborhood, come join us...

**Thank you for this opportunity to serve.**

While we fondly remember the departed.....

**George A. Kastendike, AMS®**

**01/20/2016**

**Chestertown, Maryland**



**Kristoffer Diel, AMS<sup>®</sup>  
Testing Vice President**



**Here is hoping that 2016 is a banner year for all!**

One of the ways to ensure this, is to continue investigating marine subjects that you are unfamiliar with. Surveyors are akin to medical general practitioners. While we all have some individual background training, not only do things keep changing, new things pop up every day. The recent changes in OSHA and the upcoming Subchapter “M”; are just two areas everyone should be aware of.

Not to be forgotten, is the terminology of the old wooden boats. Even if built of modern materials, the parts names often remain the same. Try by going to Google... “Wood Boat parts”.

From the SAMS<sup>®</sup> Exam world, the electrical questions are still the area of most difficulty. Unlike the rest of everyone’s life experience, vessels often have both AC and DC electrical systems; and do not forget the resulting corrosion aspects. I generally counsel people to take the ABYC E-11 course, prior to sitting for many of the exams. Also, the various committees have been/are still busy, overhauling the AMS<sup>®</sup> exams. I want to give a shout out to the Committee Chairs, and others, whom have sent in questions or reviewed the overhauled exams.

There is a new Fishing Vessel exam; and a new second attempt, Y&SC test. We are now wrestling with the Commercial Workboat exam as well.

Congratulations go out to Messer’s, *John A. Connor, AMS<sup>®</sup>, Neil Batcheler, AMS<sup>®</sup>, Michael J. Davidson, AMS<sup>®</sup>, Nathan Darcy, AMS<sup>®</sup>, Cesar Lurati, AMS<sup>®</sup>, and David L. Boersema, AMS<sup>®</sup>* for recently achieving their AMS<sup>®</sup> designations.

Surveyor Associates ... I am available to talk with you on study guides and information sources. Also, after your exam, why not call and find out what questions you did not get correct!

**Stay safe, and tie down your ladders!**



**Kenneth Weinbrecht, AMS<sup>®</sup>**  
**Education Vice President**



**SAMS<sup>®</sup> IMEC - NEWPORT 2016**  
*30 Years & Still Going Strong*

Hey everyone, it's only 7 months away! Here is some of what you can possibly expect.

1. A noted naval architect - new innovations in design and basics of stability
2. A carbon fiber mast manufacturer – design and construction of carbon fiber masts and failure analysis.
3. A major keel manufacture – design and repair of keels and keel bolts.
4. ABYC – electrical inspections for the marine surveyor, is it really that hard to do?
5. Marine Corrosion – What's it all about and how serious is it?
6. A noted maritime attorney – “A Duty To Warn” Do I really have to tell them about that thing I just noticed that might be a problem?
7. Four Stroke Outboard Failure Analysis
8. George Stafford, AMS<sup>®</sup>, CMS - Cargo Inspection of Wind Turbines. By the way, wind farm technology is increasing and many are being built; this will most likely be a new avenue for marine surveyors if properly trained to increase your area of practice.
9. Dylan Bailey AMS<sup>®</sup> - Chain plate inspection and failures.
10. Engine Sea Trials – What should the surveyor really know and what tools should he/she use?
11. Protecting/saving your files for potential litigation – Are all my files/surveys subject to litigation? How long do I need to save them?

In addition, one of our members in Rhode Island, Fredk Bieberbach Jr., AMS<sup>®</sup> has a personal relationship with the **Herreshoff Marine Museum** and the **Bristol Boat Building Company** that restores many wooden vessels. We are trying to arrange a private tour on TUESDAY, 10/25 for both facilities. If you are interested we must know by APRIL 15<sup>th</sup> if you would like this tour, this is a once in a lifetime opportunity. Newport has a nautical history dating back to the pirates, as well as hosting many Americas Cup campaigns and as you know the Herreshoff name is very prominent.

We also have another surveyor in the area, Tony Knowles, AMS<sup>®</sup> who has contacts at the **International Yacht Restoration School** and they are willing to open their doors for us as well, but only on the Tuesday before the meeting. We can't inundate these people with 200 people walking through the door so pre-planning is very important. We will investigate the cost of a tour bus from the hotel on Tuesday to these facilities if you are interested. We must know by **APRIL 15<sup>th</sup>** if you are interested.



**Joseph Lobley, AMS®  
Meeting/Conventions VP**

**Happy Spring to all of you!**

**IMEC 2016**, is in Newport, Rhode Island at the Goat Island Hyatt Regency. The room rates and F&B pricing was negotiated by Bob Horvath, AMS® and are a great bargain for this facility. The room rates are \$149.00. We also get free parking unless valet service is used. Based on the response for the questionnaire this will be very well attended. Book Early!

**IMEC 2017**, will be in Bonita Springs, Florida near Ft. Meyers at the Hyatt Coconut Point. This is a short drive from the Ft. Meyers Airport. We have a room rate of \$179.00 per night with free parking and the facility is a beautiful resort.

**IMEC 2018**, as voted on by the membership in Milwaukee, will be in Portland, Oregon. I have started the ground work and I will be traveling there shortly to visit the best options. Joe Derie, AMS® and other members in the area are very willing to help in any and every way possible.

**See You in Newport!**

**Goat Island Hyatt Regency**



**John Lowe, AMS<sup>®</sup>  
Public Relations V.P.**



**SPRING SAFETY PRIMER**

With the warm weather we've had here in the Northeast, work has been busier than usual this winter with several weather windows allowing us to get out and sound some hulls.

The big push is almost upon us, and during that time I think it's easy to get complaisant about our safety, so I thought it may be a good time for a reminder. I recently handled a claim where a forklift type travelift broke a lifting arm dropping a boat into the pit causing significant damage. While inspecting this I couldn't help but think about how many of these I have crawled under without having stands placed under the boat, NEVER AGAIN will I do this. When we took the arm to a machine shop for an inspection we discovered that there was very little healthy steel remaining, and I'm surprised there wasn't a failure earlier. It takes minimal effort to have stands put under the boat and I will always require this from now on. Not trying to preach here as I make these mistakes frequently myself. I had to learn the hard way to tie my ladder up one cold February day several years ago, as I crawled up into a large Morgan for an insurance C+V, the wind was howling and I was inside when I heard my ladder crash down leaving me stranded. There was no way to get back down as all running, rigging and dock lines had been removed and the yard was empty so I was stranded. I have a friend who runs a mechanical shop not far from the yard, and I had to call him to come over and rescue me, this resulted in months of ribbing. Good idea to carry your cell phone when working in the yards in winter as they are often empty. I will call my wife and tell her where I am and what boat I'm on and check in with her periodically and when I get off the boat. It's a good thing to be busy but take a second and think things through when working under a boat or when alone. Tie hatches up when in machinery spaces, as last year I had a hatch come down on my head. I woke up between a pair of Volvo engines wondering what had happened, luckily my head is so thick and other than a bad headache, and a large knot on the back of my head there was no noticeable permanent damage but things could have been a lot worse. By taking a few minutes and thinking through a job we can make our inherently dangerous workplace as safe as possible. Here's wishing all of you a great season, and I will look for you all in the yards.



**T. Fred Wright, AMS<sup>®</sup>**  
**Mid-Atlantic Regional Director**



Spring has sprung, all is well. Hope the phone is ringing and all are busy, mortgages paid (this month anyway). SAMS<sup>®</sup> Recommended Survey Report Content has become near and dear to my heart. As I review survey reports, not nearly enough nor quickly enough according to our queen mothers, (Rhea and Irene). I find there are some 800-900 members of this organization with that many differing report formats (and opinions). Some use Force 5, others use other commercially available forms, still others (including me), use a format they were taught when a wee lad (or lass) and finally others have created their own format from thin air. The difference is in the details, simple replies to prompts: yes/no, good, satisfactory (or the hated appears...) are usually insufficient. A properly prepared survey report paints a picture, a snapshot in time describing the findings of the expert surveyor aboard, supplemented by photos, supported by documents and other attachments, sufficiently providing a sometimes uninformed third party, who may be unfamiliar with the object being described, enough information to form an informed, intelligent decision about purchase/financing, insurance underwriting or renewal, and in the claims process, coverage dependent upon Nature, Cause and Extent.

As the busy spring and summer approach, take some time to self-review (or have a colleague review) the survey report. Is there sufficient detail; can one say something to illustrate the point a little more clearly or provide a more detailed and complete description for the party that may be miles or continents away. Finally, ask yourself, “(am I providing too much unrequired information (more pages and more pictures do not necessarily equal more information in all cases).” The report should be clear, concise and to the point; brevity is the soul of wit, but a proper report is a balancing act between too much (unnecessary fluff) and too little information.

**Best wishes to all for a successful year!**



**Scott D. Schoeler, AMS®**  
**Great Lakes Regional Director**



Early spring in the Great Lakes Region provides weather extremes of 68 degrees, a gentle south breeze with bright sunshine on Monday and on Wednesday its 20 degrees, snowing and a 30 mph Northwest wind that'll blow the hair off a dog. Today it's the latter, making it a good day to start catching up on some paperwork and writing a newsletter article.

I've heard from some that the winter was very busy with indoor surveys while others report the winter was slow and the phone just didn't ring. This is a common refrain among surveyors; it's either "feast or famine." Either I'm jammed-up with more survey reports than I can write or it seems like my phone's dead. I hear this more from younger surveyors who thought they were ready for the unpredictable ups and downs but actually experiencing it is tougher than they thought, but I hear it from seasoned surveyors as well. For most of us this is a second career and such is the case for me. My first career was in sales where I worked for several companies over many years, as an independent sales contractor. This is where I developed some steps to lessen the effect of the inevitable feast or famine cycle on my sales. I've found them to be just as useful in my career as a surveyor. Here are the five steps I developed to help manage the "Feast or Famine" cycle.

**1. ALWAYS BE MARKETING. NEVER STOP!** The biggest mistake people make is that they stop their marketing efforts when they get busy. People market during the winter but stop marketing all summer because they're busy. This leads to the "famine" part of the cycle. Don't let yourself be fooled by the feast. Always be marketing your surveying practice, even while you're busy.

**2. DIVERSIFY FOR THE CONDITIONS.** Since the Great Lakes is one of the most seasonally affected areas, we need to plan around the slow season by developing other surveying strategies. Economic factors also have an impact on the feast or famine cycle. Often times I hear people use this slow time for marketing, but since marketing doesn't "feed the bulldog" today, it is imperative to develop strategies to keep revenue flowing. This could be accomplished by becoming more proficient in a different area of surveying, or expanding your coverage area and traveling a bit more. Be creative in finding different types of surveying you can become proficient in.

**3. DEVELOP LONG-TERM CUSTOMER RELATIONSHIPS.** New surveyors who haven't built up relationships within the local marine industry are more vulnerable to this factor of the feast or famine cycle. In time, this tends to lessen but it goes-away sooner, the more quickly you develop a reputation for quality and speedy report deliveries. Another thing you can do to continue to improve your long-term relationships is to constantly improve. After you're done with the report, ask the customer for feedback, listen carefully and gain insight on ways you can add more value.

**4. ALWAYS IMPROVE YOUR TIME MANAGEMENT.** The best way to improve your time management is to develop a "do it now" philosophy and work pattern. This is plain and simple time management. Nothing new; just disciplined management of time. I've not mastered this yet but that doesn't keep me from working on it, daily. Another aspect of time management is the scheduling of surveys. Many surveyors are afraid to ask a client to adjust their time-line, so you won't be overbooked. There is also the word "No" which is often not used enough. Another aspect of time management is to allow yourself a "margin". A margin is an intentional "gap" in your schedule so you can catch-up on "stuff" that's in need of getting done.

**5. STAY POSITIVE.** When you hit a famine, it can be hard to stay positive. But a negative attitude will perpetuate the problem. Clients seem to be able to sense that you're not excited about your work and they won't hire you. Which leads to more famine. Stay positive, maintain an active network with other surveyors and peers who understand. Don't be afraid to turn to them for encouragement. If you work these steps into the coming year, you'll be in better control of your work flow and they will help to reduce the feast or famine cycle in your work life.

Congratulations to David Boersema, AMS® who sat for and passed the Yachts & Small Craft exam while in Florida. Well done David and welcome!

We've had a few new applications and we hope to be introducing some new surveyors at the next regional meeting. As a reminder to all; be sure you know where you are with your continuing education credits and make plans well in advance so you don't get caught short.

**Have a great spring!**

**Gary Frankovich, AMS®  
Florida Regional Director**



We just concluded the 2 day Florida Regional Meeting, and to my great surprise (since it was my first attempt at planning something like this) it went off with only a few minor glitches, we had 70 attendees on Friday and 90 on Saturday. Friday was fantastic, Capt. David Rifkin, AMS® put on the best full-day (8 hour plus) seminar I've ever attended. He not only went into detail on Electrical Inspections for Marine Surveyors, but also brought us up to date on the ABYC changes that go into effect this coming July. It was totally impossible not to come away from that seminar not having learned something that you will use to make you a better surveyor. Saturday we started out with a presentation by SAMS® Affiliate member Daniel May from Motor Check Analysis Clinic in West Palm Beach, FL. He explained both the process of oil analysis, as well as, what some of the contaminants found might be caused by and which ones were more serious. Another presenter was Les Trafelot of Preventative Fire, he talked about different types of fire extinguishers, as well as how to inspect engine room systems and measure to see if the bottle was large enough for the space. With the exception of these two gentlemen, every other presenter was a SAMS® member from the Florida Region, and they all did a superb job.



Speakers included Cliff Schmidt, AMS® on First Aid, Roy Shorter, AMS® on The Sea Trial (with rebuttal by Ron Doerr, AMS®), Lee Taylor, AMS® on how he's modified Force 5 for his survey reports, and Rick Foster, AMS® put on a special seminar for Surveyor Associates on common mistakes in the survey report. This just goes to show how much knowledge and talent we have in our organization and how our members are willing to share their knowledge, never be hesitant to pick up the phone and call on a colleague, you'll be amazed at just how helpful they will be. I want to give a big thanks to everyone who was involved in making the meeting a success, and that goes for not only the speakers, but also those of you who attended and asked such great questions. A special thanks goes to Jerry Schmidt, AMS® for helping take care of all the arrangements at the Pelican Yacht Club.

Last but not least, the next IMEC will be held Oct. 26-29th at the Hyatt Regency in Newport, R.I.

**DON'T MISS IT, AND MAKE YOUR RESERVATIONS EARLY!**

**Darrell R. Boyes, AMS®  
Pacific Regional Director**



**Hello All SAMS® Surveyors**

The Pacific Region just completed our Regional meeting in San Diego, CA. We had excellent attendance with right at 60 people registered. I believe the education was good and what I liked most was that it was provided by our own surveyors. I continue to believe that those that are in the field most everyday have a wealth of experience to share with the group. This year, that was proven and I want to say a big "thank you" to all of you that participated and provided us with some very good education. We are looking forward to next year's meeting which will be held in Newport Beach, CA. We hope to keep to the same time of the year and again offer some solid education. If any of you have thoughts and ideas on how to improve or add some education, please give me a call or email me and I will try to incorporate your thoughts about education into what we will present.

Several years back the DNR (Department of Natural Resources) rammed through the State Legislature a bill ( SHB2457) aimed at cleaning up our waterways that have become home to numerous derelict vessels in more recent years. I use the term "rammed" because in many ways the bill was not thought out and used a broad brush stroke to become law. In essence this bill requires that every vessel over 40 years old and over 65 feet in length be inspected at the time of sale, 40 years takes us back to 1976. Many commercial vessels of this age are still actively in service and in good condition. What this means, is that every vessel in the category mentioned needs to undergo an inspection at the time of the vessel sale. This inspection needs to be done by a qualified Marine Surveyor and must meet specific criteria. A failure to comply makes the seller as well as the buyer (Owner) responsible for the vessel should it become a derelict, or be the cause of waterway pollution. I was able to attend several meetings regarding this new law after it was already passed and it is evident that this remains unclear what will actually become the standard with these new requirements. What is clear, is that this has created some new and interesting surveys for me to have the opportunity to be a part of. Somehow my name has gotten out there as one who can perform these required surveys and I am getting regular calls for this type of work. My point is this; if your State is moving in this direction (and many are or have) become involved in the process. It may very well open the door to different work that you can charge well for. I am attaching our States inspection requirement for all to see. Your present inspection reports will more than qualify you for this work.

**Have a good and prosperous Year !!!**



WASHINGTON STATE DEPARTMENT OF  
**Natural Resources**  
Water Quality Form number WQ-101 (1/04)

### VESSEL SURVEYOR FORM AND REPORT CHECKLIST

Use this form to verify the vessel survey inspection elements for vessels that are 40 years or older and 65 feet or longer. Attach a copy of the completed Vessel Inspection Disclosure Report (per RCW 79.100.150).

*Please type or print plainly*

|  |                                  |      |   |               |          |                    |
|--|----------------------------------|------|---|---------------|----------|--------------------|
| Registration number  | Hull identification number (HIN) | Year | Make  | Series / Body | Length   | Certificate number |
| Name of vessel surveyor  |                                  |      |   |               |          |                    |
| Address of vessel surveyor   |                                  |      | City  | State         | ZIP code |                    |
| Phone  |                                  |      | Email   |               |          |                    |
| I declare that I provided the registered owner or prospective buyer a copy of the attached Vessel Inspection Disclosure Report prior to the sale or transfer of the above-referenced vessel. |                                  |      | X _____<br>Signature of vessel surveyor <span style="float: right;">date</span> |               |          |                    |

#### Checklist for Vessel Inspection Disclosure Report—for reference.

(per WAC 332-08-123 Required elements of a survey for reference purposes This checklist does not need to be filled out for submittal to DNR.)

|   |  |  |   |
|---|--|--|---|
| <b>Cover page:</b>  | <input type="checkbox"/> Report title / type of survey                       | <input type="checkbox"/> Surveyor contact info.            | <input type="checkbox"/> Date report issued     |
|   | <input type="checkbox"/> Current photograph(s) of vessel, date, and location |  |   |
| <b>Vessel description:</b>  | <input type="checkbox"/> General description                                 | <input type="checkbox"/> Current legal owner               | <input type="checkbox"/> Intended use of vessel |
|   | <input type="checkbox"/> Vessel name   | <input type="checkbox"/> Design                            | <input type="checkbox"/> Construction type      |
| <b>Vessel particulars:</b>  | <input type="checkbox"/> Builder   | <input type="checkbox"/> Displacement                      | <input type="checkbox"/> Length                 |
|   | <input type="checkbox"/> Breadth   | <input type="checkbox"/> Draught                           | <input type="checkbox"/> Fuel system            |
| <input type="checkbox"/> Surveyor's notes / condition rating  |  |  |   |
| <b>Systems evaluation:</b>  | <input type="checkbox"/> Type of propulsion                                  | <input type="checkbox"/> Auxiliary engines                 | <input type="checkbox"/> Electrical systems     |
| <b>Conditions:</b>  | <input type="checkbox"/> Overall appearance                                  | <input type="checkbox"/> Hull and superstructure condition |   |
| <input type="checkbox"/> Surveyor recommendations   |  |  |   |
| <input type="checkbox"/> Appraisal of market value  |  | <input type="checkbox"/> Replacement value                 |   |
| <input type="checkbox"/> Physical suitability of the vessel and its equipment for its intended use  |  |  |   |
| <input type="checkbox"/> Determination whether the cost of repairs required to return the vessel and its equipment to physical suitability for its intended use is likely to exceed the market value of the vessel. |  |  |   |

7/1/14

**Eddy J. Assaf, Jr., AMS®  
Canada Regional Director**



Well I don't know about the rest of you, and even though the winter here in Quebec has been pretty mild, I sure will be happy when she is gone and we can get back to working on a more regular schedule.

When I last looked at the end of February, Canadian Marine Advisory Council (CMAC) has still not set a date for the next meeting but I will try to keep you informed in case you would like to be present. Actually more of us should go, gives us an idea on where things are heading.

As some of you have seen, I did try to make an attempt on a Regional Meeting in March, but due to unsubstantial responses from the members (only 55% gave me answers) an insufficient amount of people to attend. I had to put it off until later this year. I would like to hear from some of you who are interested in telling me a little bit of what they would like to see, where it should happen and most important what time of the year is convenient. (52 weeks in a year and there is never a good one). Your input would really be appreciated.

The marine industry is a little quiet here in La Belle Province, but with the new US-Canada exchange rate (ouch), it will probably generate a whole lot of southern buyers into our territories and hopefully improve a little on the used boat sales, which has been struggling for the past few years.

For those who have good relationships with insurance companies and brokers, keep your contact close, even though they advertise "NO SURVEY REQUIRED" making them realize that having a survey only helps all parties involved and they should at least offer it to their clients as an option.

I also want to take this time to congratulate John Hines, AMS® for taking and successfully passing his AMS® exam in December of last year at the Gulf Regional Meeting. Welcome aboard John. There are quite a few of you who are due to upgrade to AMS® and should get the ball rolling as much as possible, and if you can, before the rush starts. Please contact me if you are eligible.

Hope some of you took advantage of the quiet winter season to catch up on CE credits which is the best time, but usually involves some travel, but we all have to do it. Please forward your credits to headquarters so that they can be registered and counted.

A West Coast Sub-Regional Meeting will be set up with my go-to guy out west, John Roberts, AMS® (John and I have talked about it so he won't be totally surprised by this newsletter).

Here is hoping for a busy and prosperous spring and summer and hope to see you all at the Regional's and/or the IMEC.

**Cheers**

**John McDonough, AMS<sup>®</sup>**  
**North East Regional Director**



## **Hello Fellow Surveyors**

It's February here in New Hampshire and time to catch up on home projects and tinker with the old VW van in the garage.

Yesterday, I had the honor to proctor an exam for a gentlemen from New Jersey, here at my local library in Rye. Snow was coming down hard, which this year has been unlike the last, when I had to shovel the roof three times by now. During a break we had a conversation which gave me an idea for an article. The subject came up about Yacht Brokers and how they have the ability to feed us work. Now, I have been at this for several decades and realize that this subject can be taken in different ways. Certainly, no one wants to be known as the "Brokers Darling". Years ago I had an irate broker scream at me over the phone, that due to my survey he could no longer buy his daughter a pony! This afternoon I spent time on the phone with an old acquaintance who is brokering a boat that I will be looking at soon. I have been working with this particular broker for many years and consider her a good friend. There are others in my area that cause me to take a deep breath. There are many yacht brokers that I work with routinely who are professional and take my recommendations seriously. Obviously, there are others who minimize what I have to say and are just doing their best to move a product. The brokers who stay in the business year after year are looking out for their clients wellbeing and hope to sell them more than one vessel as they either upgrade or downsize over time. I have a close friend who is an Underwriter who calls this a "Duplicitous Relationship". We all have them and that is just part of the business. How we handle them boils down to our own personal ethics. Being referred by the same broker year after year is not necessarily a bad thing. Marina managers and Claims managers do the same thing but don't seem to suffer the same bad rap. As time goes by we learn who, and which brokers are in this for the long haul, and who are looking out for the best interest of their clients. In my opinion, a good Yacht Broker wants to sell their clients more than one vessel and is grateful that you found a particular deficiency that could give them a bad reputation, as well as yourself. A duplicitous relationship works both ways after all. I have referred many Brokers, Surveyors and Insurance agents over the years, and just as importantly steered them away from others. I am sure you have all heard the same story. The broker gave me three names, you were at the top of the list. More than likely you are there because you do a thorough job for your clients, which you have proven over time. Going to seminars and regional meetings gives us the opportunity to meet each other and network. As many have said prior, you generally only refer those you know or know of.

### **All The Best**

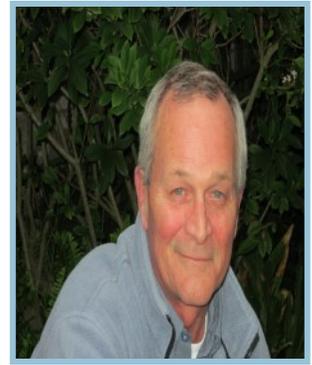
#### **Attention All SAMS<sup>®</sup> Members**

SAMS<sup>®</sup> Google Group - <https://groups.google.com/forum/?hl=en#!forum/marinesurveyors> .

To access the SAMS<sup>®</sup> Group, please go to the above link. Upon logging in, an approval will be given via SAMS<sup>®</sup> HQ to enter the site. To be approved you need to be a member in good standing and you will need your display name (nickname) to show your first and last name.

The cost of this is covered as part of your annual dues. All we ask is that you abide by the group Policy, and show respect to your fellow surveyor.

**Thor Jones, AMS®  
Gulf Regional Director**



Hello to everyone from the Gulf Coast Region. Hope everyone is having a great 2016 and looking forward to seeing you in Rhode Island (I think that is somewhere north of Interstate 10 – will have to get my smartphone to give me directions).

Over the last several years I have received numerous calls, e-mails and inquiries from members regarding Load & Secure, Discharge, Warranty surveys – all related to heavy lift or oversized cargo. The queries are from members who have been approached to perform these surveys and are somewhat 'shell shocked' by the amount of money being offered for these types of surveys.

For cargo surveyors reading this article I realize this is an over simplification but I refer to these as project cargo surveys. Generally speaking these projects involve the movement of an oversized, very heavy piece of equipment or vessel (e.g., USS "COLE") from origin to destination aboard inland and ocean vessel(s), land based specialized transport, rail, etc. Somewhere in that process, a marine surveyor is hired and has to approve the load out and/or movement.

Again, speaking in general terms, these cargo loads are engineered. That is, allegedly smart and intelligent persons have done some very serious calculations regarding loads, stability, tie downs, etc. Based upon my experience with these projects, the engineering drawings and specifications do not always translate from the engineers' drawing board to the actual project in the field.

The cargo owner, various Underwriters, charterer, ship owner/operator, etc. want a marine surveyor to ensure their particular interests are protected. As the marine surveyor, you are the last line of defense to make sure the cargo is properly loaded and secured for the particular voyage and/or movement on behalf of your client.

If you, as a marine surveyor, accept these assignments/jobs, at a minimum you should personally observe and inspect the 'load & secure' of the equipment/cargo onto the vessel; ensure cargo/equipment is loaded in a manner that does not compromise the vessel structure or stability and the cargo/equipment is properly secured for the intended voyage/transit. It might be necessary for the marine surveyor to modify engineered securing arrangements while in the field, and on site, during loading operations. But, understand that if you do modify the securing arrangements, you, personally accept the consequences if that cargo is damaged or lost. You must also review the particulars of the intended voyage of the vessel(s) carrying/towing the cargo/equipment.



These surveys, or projects, are very lucrative if you are qualified, willing and are able, to accept the financial liability, not to mention the possible loss of life, possible pollution/environmental issues, etc., if the cargo is damaged, lost or causes harm to other parties. I have been, and am currently, hired on many project cargo surveys. I get many calls regarding project cargos (load & secure, trip in tow, on-hire, off-hire, discharge surveys, etc.) but, I am very careful in that I do not accept assignments I am not qualified to handle or am not comfortable to advise on – refer those to other marine surveyors I know are qualified for that particular project.

Full disclosure: Have to admit I have sleepless nights while the cargo and/or vessel I surveyed is in transit, worried I missed something ...

I encourage those of you to accept these projects. The international market is looking for professional marine surveyors to handle these project cargos. SAMS® has several very knowledgeable members that can assist and help you with these assignments. Do not hesitate to reach out to other members for assistance and help regarding any job or project.



# Valuing Vessels

Kenneth Weinbrecht, AMS®

I know.... you're not an appraiser; you're a marine surveyor. But consider this, when you place a value on something, you've just acted as an appraiser as well as a marine surveyor. Our job is really two fold; inspect the boat for safety concerns, (will it sink, blow up or cause personal injury) and then tell your client what the fair market value is from all of your research using a prescribed method of valuation. Be ethical, do a good job and present the "FACTS" as you see them, which is what we do.

So why this article about valuing a vessel? Over the years I have come across many surveys that do not list the reference sources for the opinion of value. Many just list the value with no justification on how that value was determined. So, here's a little history about the appraising profession and USPAP.

## What is USPAP?

The Uniform Standard of Professional Appraisal Practice. (USPAP)

In 1986, nine leading professional appraisal organizations in the United States and Canada formed an Ad Hoc Committee on the *Uniform Standards of Professional Appraisal Practice* (USPAP) in response to the crisis in the savings and loan industry. In 1987, the Committee established the Foundation to implement USPAP as the generally accepted set of appraisal standards in the United States. These organizations recognized the importance of ensuring that appraisals are based upon established, recognized standards.

**In 1989, the U.S. Congress enacted the *Financial Institutions Reform, Recovery, and Enforcement Act (FIRREA)*, which authorized the Foundation as the source of appraisal standards and qualifications.** The Foundation is not a membership organization but rather is composed of other organizations. These other organizations sponsor the Foundation and if you are a member of one of those organizations you are required to follow certain standards. If you are not a member, you are not required to follow these standards but encouraged to follow them.

The Appraisal Foundation places great importance on public trust in the valuation process.  
Some Definitions (USPAP 2014-15 Edition.)

**APPRAISER:** one who is expected to perform valuation services competently and in a manner that is independent, impartial, and objective.

**APPRAISAL:** the act or process of developing an **opinion of value**; an opinion of value of or pertaining to appraising and related functions such as appraisal practice or appraisal services.

**CREDIBLE APPRAISAL:** – A credible appraisal is one that is worthy of belief. A credible appraisal includes support, by relevant evidence and logic, for the opinion of value.

**PERSONAL PROPERTY:** identifiable tangible objects that are considered by the general public as being "personal" - for example: furnishings, artwork, antiques, gems and jewelry, collectibles, machinery and equipment; all tangible property that is not classified as real estate.

Vessel fall into the machinery and equipment section.

**When does the USPAP Rules and Standards Apply?** USPAP does not establish who or which assignments must comply. Neither The Appraisal Foundation nor its Appraisal Standards Board is a government entity with the power to make, judge, or enforce law. An appraiser must comply with USPAP when either the service or the appraiser is required by law, regulation, or agreement with the client or intended user. Individuals may also choose to comply with USPAP any time that individual is performing the service as an appraiser.

**Who owns the appraisal / survey report?** This comes up a lot and if you have agreed in your confidentiality agreement not to disclose any information to any third party, then you can't unless it's required by law, i.e. state / federal law enforcement agency etc. But that being said, some appraisers use a "release" form sent to the first client and if they agree after signing and returning the release form to you, you can be released from disclosure, but any confidential information that is not public still cannot be disclosed. Surveying the vessel again is not wrong, something it might have changed for the worse or better (repairs made or not made) since you looked at it and conducting a new survey is fine with "**full disclosure**" to all concerned.

### ***The Sales Comparison Approach to Value***

A procedure to conclude an opinion of value for a property by comparing it with similar properties that have been sold or are for sale in the relevant marketplace by making adjustments to prices based on marketplace conditions and the properties' characteristics of value.

This is the approach we use almost all of the time; using comparable sales etc. These comparables usually come from the recognized industry sources, i.e. BUC, Yachtworld, sold boats etc.

### ***The Cost Approach to Value***

A procedure to estimate the current costs to reproduce or create a property with another of comparable use and marketability and using applicable depreciation.

A one off design vessel with no comparables would fall into this category. The cost to replicate or at least to reproduce the vessel and then apply applicable depreciation. There are two depreciation scales that have been used in the past (both are quite old but admitted in court). The INA scale is used for commercial vessels and the Martin scale is for pleasure craft. (Attached) They are just another source to use in your opinion of value.

### ***The Income Approach to Value***

A procedure to conclude an opinion of present value by calculating the anticipated monetary benefits (such as a stream of income) for an income-producing property.

We really don't use this approach, it is more for business and commercial real estate but it could be used to value a commercial vessel's income producing value. Any time I have a business that must be evaluated for the income approach I refer them to a Business Valuation professional.

So, when we inspect a vessel whether pre-purchase, insurance survey, estate evaluation, donation, etc. we place a value on it. That value must have data, information and analysis necessary to support your opinion. A simple value figure on a report does not really justify your opinion of value. You should document the sources of value in your report, i.e. Yachtworld, sold boats, Internet listings, etc.; with dates, values and even the state or country where it was listed or sold (Geographical value). There really isn't anything wrong with using a lot of comparables, the more information you put in your report the more credible your opinion will be.

A number of years ago I took a course from a woman who had a degree in fine art and whom had spent over 30 years with the IRS as an examiner reviewing donations of fine art in excess of one million dollars (yep...people do make donations that large). She said that one of the biggest complaints she had was that the reports from appraisers were too complex and difficult to read, understand and their opinion of value was not supported in their report. That causes confusion and sometimes concern for the examiner and possibly problems for the donor. She said, "Consider writing a report as if the person or persons reading it had absolutely no knowledge of a boat." If you can list all of your comparables, dates, prices and location of sale; it will be easier for everyone to understand, especially if it's going to the IRS or before a court.

If you're interested in taking a USPAP course you can contact any evaluation organization and take one. There are two courses, a 15-hour course with a test at the end. This is recommended for all persons taking USPAP for the first time. The 15-hour course is quite complex and to be honest can be boring. If you decide to take it, take the "personal property" course. The other course is for real property and is not for us.

There is a 7 hour review course that you must take every two years to be “USPAP Compliant”, so this is not a one shot deal, being compliant is an every two year commitment. Speaking of being compliant, by taking a USPAP course does not “Certify” or “Accredit” an appraiser, it just means that you are USPAP compliant. I mention this because I have seen some surveyors list themselves as an ASA (Accredited Senior Appraiser) because they took a USPAP course. An ASA is a designation that is awarded to persons that have taken rigorous course work (years), submit a documentation log of all of your appraisals, submit reports that are compliant and pass a final exam.

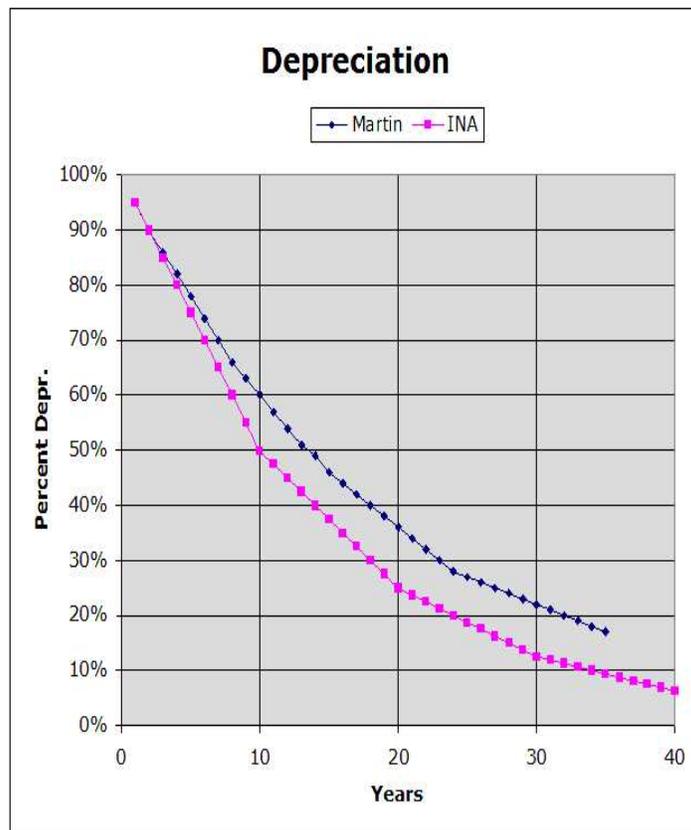
There are some IRS publications that you might want to consider having in your library, and they’re free.

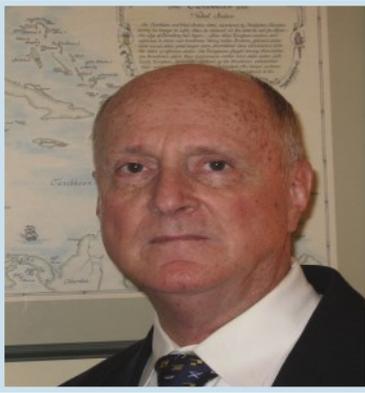
Publication 526 – Charitable Giving  
 Publication 561 - Determining the Value of Donated Property

Depreciation Scales For Vessel Appraisal

- A. Martin Scale is to be used for Pleasure boats based on Current Replacement Value.
- B. INA Scale is to be used for Commercial boats using Current Replacement Value.

| Year | Martin | INA    |
|------|--------|--------|
| 1    | 95%    | 95.00% |
| 2    | 90%    | 90.00% |
| 3    | 86%    | 85.00% |
| 4    | 82%    | 80.00% |
| 5    | 78%    | 75.00% |
| 6    | 74%    | 70.00% |
| 7    | 70%    | 65.00% |
| 8    | 66%    | 60.00% |
| 9    | 63%    | 55.00% |
| 10   | 60%    | 50.00% |
| 11   | 57%    | 47.50% |
| 12   | 54%    | 45.00% |
| 13   | 51%    | 42.50% |
| 14   | 49%    | 40.00% |
| 15   | 46%    | 37.50% |
| 16   | 44%    | 35.00% |
| 17   | 42%    | 32.50% |
| 18   | 40%    | 30.00% |
| 19   | 38%    | 27.50% |
| 20   | 36%    | 25.00% |
| 21   | 34%    | 23.75% |
| 22   | 32%    | 22.50% |
| 23   | 30%    | 21.25% |
| 24   | 28%    | 20.00% |
| 25   | 27%    | 18.75% |
| 26   | 26%    | 17.50% |
| 27   | 25%    | 16.25% |
| 28   | 24%    | 15.00% |
| 29   | 23%    | 13.75% |
| 30   | 22%    | 12.50% |
| 31   | 21%    | 11.88% |
| 32   | 20%    | 11.25% |
| 33   | 19%    | 10.63% |
| 34   | 18%    | 10.00% |
| 35   | 17%    | 9.38%  |
| 36   |        | 8.75%  |
| 37   |        | 8.13%  |
| 38   |        | 7.59%  |
| 39   |        | 6.88%  |
| 40   |        | 6.25%  |





**Joseph A. Derie, AMS®  
SAMS® Commercial Workboats Chair**

### **MINIMUM REQUIREMENTS FOR SAMS® COMMERCIAL WORKBOAT (CW) SURVEY REPORTS**

At the 27 January meeting, the SAMS® Board of Directors approved the “Minimum Requirements for SAMS® Commercial Workboat (CW) Survey Reports” (“Minimum Requirements”). I was asked to develop this document because of the variety of the vessels that are encompassed by the SAMS®/AMS® Commercial Workboat designation, and observations by Jim Sepel, AMS®, the Membership VP, and myself, made when reviewing the surveys submitted by surveyors wanting to join SAMS®, or upgrade to SAMS®/AMS® Commercial Workboat. From our reviews it was obvious that many of them did not demonstrate that the surveyor had the knowledge of vessel systems and standards required to properly survey commercial workboats.

The “Minimum Requirements” give surveyors guidance on survey report content and what to look for when they survey a commercial workboat. The “Minimum Requirements” are broken into eight categories: “**General Survey Comments,**” “**Vessel Description/Service,**” “**Hull Construction and Details,**” “**Deck,**” “**Machinery,**” “**Pollution,**” “**Emergency and Safety Equipment,**” and “**Appraised Value and Summation.**”

These categories are further subdivided into pertinent sub-categories.

The “Minimum Requirements” are available from the SAMS® office or by contacting me directly. Interested surveyors applying to SAMS® will be provided copies with their membership package. They should be understood to be exactly what they purport to be, the minimum requirements for surveys of Commercial Workboats. Additional items will be required based on the type of vessel, the waters it operates on, the vessel’s equipment and systems, as well as other vessel peculiarities. The Commercial Workboat surveyor should use their knowledge and experience to provide a survey and report which addresses all issues pertaining to the intended commercial operation of the vessel.

A Commercial Workboat surveyor is expected to know and understand the requirement for any additional items and include them in their report. Due to the number of, and various types of Commercial Workboats and inspected passenger vessels, it is entirely possible that a SAMS® AMS® qualified for Commercial Workboats may not be qualified to survey some Commercial Workboat vessels. Note that a surveyor agreeing to survey a vessel that they are not qualified to survey could be a serious ethics violation and could expose the surveyor to potential liability issues.

As always, I hope anyone who wants to discuss this column or the “Minimum Requirements,” or has questions about surveying Commercial Workboats will contact me at 503-236-6818.

# Course Review

## National Cargo Bureau

### CSS- Annex #13

**By: George Stafford, SAMS®/AMS®, #069**

If any of you practicing Marine Surveyors out there are like me, you often see courses advertised and think that some more knowledge and SAMS® credits would be a good thing during the winter when work slows some for us in New England. This thought prompted me to recently enroll in the National Cargo Bureau, Inc., Securing of Non-Standardized Cargo, self-study course. This is in accordance with International Maritime Organization, IMO, Annex 13, Code of Safe Practice for Cargo Stowage.

National Cargo Bureau, Inc. offers a practical and thorough introduction to the subject of cargo securing in the form of a U.S. Coast Guard-approved correspondence course. The course consists of eight modules, each with their own examination questions. The fee is \$610 for the course which covers the cost of all materials necessary to complete the course.

The course consists of more than the textual materials, however. Each work assignment lesson is submitted to the National Cargo Bureau upon completion. After correction and review, the lesson is returned to the student with appropriate comments. Upon satisfactory completion of the course, a certificate is issued. Most students complete the course in three to four months. I decided to do it in four weeks which in hindsight, was a poor decision. Did I mention hurrying through it was a poor decision?

The Self-Study Course may be obtained by contacting the NCB headquarters in New York. Additional fees will be charged for handling on course material being mailed outside of the United States. Shipping fees will be charged at cost. A bank service charge of \$40.00 will be added for all checks drawn on foreign banks or submitted in foreign funds.

As of December 31, 1997, in accordance with regulations of the International Convention for *Safety of Life at Sea* (SOLAS), it became mandatory that cargo units and cargo transport units be secured throughout the voyage as per the Cargo Securing Manual approved by the vessels Flag State Administration. If a ship transports cargo which is not accompanied by normal systems ie.; a container ship with container cells, the regulations provide a method for calculating a satisfactory securing arrangement.

In order that surveyors handling for example; load & stow assignments, understanding this Annex 13 material and proficient use is important. This self-study course is intended to provide explanation, illustrative examples and exercise in its practical application. The course is presented in eight lessons which are developed from four basic factors:

(1) Forces that cargo is subjected to (2) Devices used for securing (3) Securing arrangements and (4) Calculations which demonstrate that the forces involved are adequately balanced by the securing provided.

When you register and take this course you get the NCB manual but you also receive a copy of the IMO Code, Cargo Stowage and Securing. That second book includes Annex #13. That second book is the authority for the course content. The entire course is in Metric units with conversion from English when needed. In order to pass, students must get at least 50% for each lesson and an overall average of the total lessons of at least 70%. Certificates are awarded to students who pass.

The bad news. So, now comes the fun part. Have you had algebra, geometry, trigonometry, and physics in the last 30 years? I have not since college. Did you ever study stability, GM, righting arms, vector analysis or coefficients of friction? Did anyone ever remember the high school saying “some old horse caught another horse taking oats away”? That was how I remembered the trig functions 35 years ago. Sine = opposite over hypotenuse, Cosine = adjacent over hypotenuse and Tangent = opposite over adjacent. Do you remember Newton’s law of gravity... $F = M * A$ ? Are we having fun yet?

Being an older student this was a scary proposition as soon as I opened the study course book, I was concerned. The lessons build on each other and are cumulative to the last two; lessons 7 & 8 are in my opinion difficult. At least, they were for me, being out of school so long.

Now for the good news. Don't be afraid...NCB will help you. National Cargo Bureau had assigned me a teacher named Captain Phil Anderson. Phil was an ex-master of a cargo vessel with a British accent and a great sense of humor. More importantly, he was a tremendous teacher, patient and very compassionate toward older students. The NCB support to students through its New York office is at no additional charge and in my opinion, excellent.

They are always accessible and answer all questions quickly. Remember those college teachers that took forever to grade your tests?

The NCB grading and turn around is remarkable....fastest I have ever experienced. All lessons were graded within 12 hours!

What is Non-Standardized Cargo you will ask? Good question. These are usually large singular units shipped onboard a vessel, the stowage arrangement for which could not be included in the basic design of a ship. Most ships have a cargo securing manual but these may not include non-standardized cargo. Examples are: containers being carried on deck of ships which are not designed especially for the purpose of carrying containers, portable tanks, special wheel base cargoes, locomotives, transformers and large pieces of machinery inside a flat rack container.

Cargo must be well secured against movement because a ship at sea is subjected to motions which can cause the cargo to slide and/or tip. The motions of roll, pitch, yaw, sway, surge and heave all have to be accounted for in calculations and the forces considered in securement.

When you take this course, you will learn the criteria for estimating the risk of cargo shifting. You will learn the behavior of large heavy pieces of cargo. You will learn about forces; longitudinal, transverse and vertical. You will learn about lashings and the angles that they take. Most importantly, you will learn exactly how to calculate if a cargo arrangement is adequate.

The most useful calculation method you will learn in this course, in my opinion, is the "Rule of Thumb". This is what most insurance companies require you to know for the acceptance of non-standardized loads. Load and stow surveys often place the Marine Surveyor in the difficult position of accepting or rejecting the securement of non-standardized cargo. Stowage may be either directly onboard a ship or on a flatbed trailer for over the road transport first.

This course is well worth the \$610.00 in my opinion and is a challenging study assignment. This will also allow you to possibly increase the level of services you can provide to your customers. **Remember;** education is expensive but the cost of ignorance can be even greater.

For further information or to order this course, please contact the NCB New York Office ([ncbnyc@natcargo.org](mailto:ncbnyc@natcargo.org)).

## Scandinavian Star

Link to the investigation of the 1990 Marine Casualty and Fire aboard the passenger ferry Scandinavian Star. The video of the investigation may be very useful as a training aid and discusses techniques and fire theory for marine fire investigations, many of which were discussed at the IAAI marine fire investigation training I attended in NJ a couple of years ago.

David Condino, AMS<sup>®</sup> Member SAMS<sup>®</sup>, IAAI, ABYC

<http://maritime-executive.com/article/inspector-crew-set-fatal-fire-on-scandinavian-star>

## USCG Rules of the Road Quiz:

### Do You Know the Nuances?

CAPT Joseph A. Derie, NAMS-CMS; AMS<sup>®</sup>, SAMS<sup>®</sup>; CMI  
Chair, Commercial Workboats Committee, SAMS<sup>®</sup>  
Southwest Passage Marine Surveys, LLC

A marine surveyor should have a professional's knowledge of the USCG Rules of the Road. As with anything else it is imperative that they understand the nuances of the Rules of the Road and how they are applied. Below is a short quiz to test your knowledge. It is designed to be taken without reference to the Rules of the Road. All questions are keyed to both the COLREGS and NAVRULES. The answers will be discussed following the test.

1. A vessel sounding three short blasts is going astern.

True \_\_\_

False \_\_\_

2. A meeting situation "shall be deemed to exist when a vessel sees the other ahead or nearly ahead and by night she could see the masthead lights of the other in a line or nearly in a line and/or both sidelights and by day she observes the corresponding aspect of the other vessel."

True \_\_\_

False \_\_\_

3. A sailboat under sail overtaking a power boat is the stand-on vessel.

True \_\_\_

False \_\_\_

4. A long blast is 4 to 6 seconds.

True \_\_\_

False \_\_\_

5. The Rules of the Road stipulate that the stand-on vessel has the right of way.

True \_\_\_

False \_\_\_

6. All vessels must be equipped with the navigation lights prescribed in Subpart C – *Lights and Shapes*.

True \_\_\_

False \_\_\_

7. A recreational vessel underway with a serious steering problem can exhibit the lighting and day shape of a vessel "restricted in its ability to maneuver."

True \_\_\_

False \_\_\_

8. "Proper use shall be made of radar equipment if fitted and operational, including long-range scanning to obtain early warning of risk of collision and radar plotting or equivalent systematic observation of detected objects," only applies to commercial vessels.

True \_\_\_

False \_\_\_

9. The all-around white light allowed for vessels less than 12 meters shall be at least 36" higher than the sidelights.

True \_\_\_

False \_\_\_

10. An overtaking vessel may turn the overtaking situation into a crossing situation once it is more than 22.5 degrees abaft the beam of the vessel it is overtaking.

True \_\_\_

False \_\_\_

The answer to all the above questions is **False**. Congratulations if you got 100%.

The answers are discussed below.

**Question 1.** Rule 34 (a) states: “Three short blasts to mean - I am operating astern propulsion.” That does not mean the vessel is going astern. A vessel will take time to take its way off and go astern.

**Question 2.** There is no such thing as a meeting situation. The situation described is a “Head-on” situation (Rule 14 (b)).

**Question 3.** Rule 13 states that “Notwithstanding anything contained in Rules 4 through 18, any vessel overtaking any other shall keep out of the way of the vessel being overtaken.” This makes the sailboat the give-way vessel.

**Question 4.** Rule 32(b) describes a *prolonged blast* as 4-6 seconds. There is no such thing as a long blast in the Rules of the Road.

**Question 5.** There is no right of way in the COLREGS. The NAVRULES describe “right of way” in Rules 9 and 14, in that “a power-driven vessel operating on the Great Lakes, Western Rivers, or waters specified by the Secretary, and proceeding downbound with a following current shall have the right-of-way over an upbound vessel, shall propose the manner of passage, and shall initiate the maneuvering signals prescribed by Rule 34(a)(i) (§ 83.34(a)(i)), as appropriate.” The downbound vessel in this situation is not a stand-on vessel.

**Question 6.** Rule 20(c) states: “The lights prescribed by these Rules shall, if carried, also be exhibited from sunrise to sunset in restricted visibility and may be exhibited in all other circumstances when it is deemed necessary.” The key words here are *if carried*. Note that there are many small sailboats built without navlights, as are PWCs. (No, PWCs do not have a dispensation from the USCG to be built without lights.) In fact, there are ferry boats operating without navlights. The key here is that any vessel without navlights cannot be out at night.

**Question 7.** Rule 3(g) states that “The term *vessel restricted in her ability to maneuver* means a vessel which from the nature of her work is restricted in her ability to maneuver as required by these Rules and is therefore unable to keep out of the way of another vessel.” The key phrase here is “from the nature of her work.” By definition therefore, a recreational vessel cannot be a “vessel restricted in her ability to maneuver.”

**Question 8.** Rule 7(c) applies to all vessels, not just commercial vessels. Surveyors doing Pre-purchase and Condition and Valuation Surveys of yachts equipped with radar should remind the owners or buyers of this requirement, so that they will know to familiarize themselves with the operation of the vessel’s radar.

**Question 9.** Annex I of the Rules of the Road (par. 2 of the COLREGS, 33 CFR 84.02(d) of the NAVRULES) states that this light should be 1 meter (39.4”) higher than the sidelights. Surveyors surveying vessels with this lighting should verify this height. (I have seen boats with the all-around white light mounted on the top of the outboard engine cowl. Needless to say this wasn’t high enough.) Another thing to look for is whether the ski tower or the owner standing at the helm blocks the view of this light from any sector.

**Question 10.** Rule 13(d) states that: “Any subsequent alteration of the bearing between the two vessels shall not make the overtaking vessel a crossing vessel within the meaning of these Rules or relieve her of the duty of keeping clear of the overtaken vessel until she is finally past and clear.”

It is necessary to understand the way a rule is worded, be exact and use the appropriate terminology when discussing the Rules of the Road. I’ve seen many “expert” reports where the investigator fell into a trap of not being specific enough in their description or using the wrong terminology. This can be embarrassing (at the least) to the investigator and detrimental to their client.

Anyone with questions or comments on the above should contact me directly. Interesting comments or further explanations will be included in a future article.



## IMPORTANT MEMBER INFORMATION



### Attention All AMS® Members

The SAMS® Nominating Committee is accepting nominations for the upcoming election of officers at the Annual Business Meeting on Saturday, October 29, 2016 in Newport RI. Any AMS® members interested in running for elective office should apply in writing with accompanying documentation to show the Nominating Committee your qualifications, knowledge and understanding of SAMS® Policies and By-laws. The letters should be addressed to the SAMS® International Office. Attention: Chairman/Nominating Committee. Nominations can also be made from the floor during the Annual Business Meeting, per SAMS® Policy.

### Educational Event

#### Friends of ASA New Orleans USPAP Event Information

Please Follow Link:

<http://www.marinesurvey.org/images/20160201122919.pdf>

### CE CREDITS REMINDER: Each request should include;

\* Your AMS® or Surveyor Associates CE Credits Reporting Form, \* Your certificate of attendance or certification, etc., \* An agenda for the Seminar/Training Class/Event attended, \* If the training was "Distance or Online Learning" was the test distance or online as well as the training or was it a proctored test?

The more details you submit the better .

### Reminder!!

All Surveyor Associates who have not yet become an AMS® Candidate must submit one survey per year within 30 days of the anniversary date of their membership. Please refer to the "Up or Out" Policy for further details.

You can now obtain 50% of your CE requirement from on-line learning courses and if there is a proctored final exam; FULL CREDIT will be given with proof of passing the exam. If there isn't a proctored exam, 50% (30 CE's maximum) will be awarded with proof of attendance.



## MEMBER'S CORNER DECEMBER 2015 THROUGH FEBRUARY 2016

The following members are now an Accredited Marine Surveyor with the earned designator:

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The following members are now an Accredited Marine Surveyor with the earned designator:

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The following people have been accepted into SAMS® as:

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**Wishing you lots of enjoyment and relaxation in whatever  
you decide to spend your time doing !!!**



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