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Rental Boat Safety Best Practices (DRAFT)

Please forward you comments to:

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Canada

Rental Boat Safety Best Practices (DRAFT)

INTRODUCTION

These best practices are intended as guidance for rental boat agencies offering pleasure boats for rent to the public.

From November 2014 to mid-March 2015, a series of interviews were conducted with stakeholders with an interest in advancing rental boat safety. The purpose of these interviews was to explore the kinds of things rental agencies do to provide a safe, enjoyable rental experience to the public. Stakeholders included owners and staff of rental boat agencies and associations, enforcement officials, insurance providers, and boating safety practitioners.

Ten key themes emerged from the information gathered from stakeholder interviews. These themes represent best practices across a broad spectrum of rental boat agency activities, with client safety being the overarching connection between all the practices. *Rental Boat Safety Best Practices (DRAFT)* includes all ten best practices in the form of short summary statements, followed by a brief explanation from the perspective of the participating stakeholders.

We invite you to review *Rental Boat Safety Best Practices (DRAFT)* and provide written comments to Transport Canada no later than June 30, 2015 by using the *Rental Boat Safety Best Practices Feedback Form* at the end of the document.

Best Practices

SAFETY

Your rental boat business reflects a culture of safety, with client safety being the top priority.

Here are the tips shared by seasoned rental boat agency owners:

Clients should know that their safety is your number one priority because it is emphasized in every aspect of your business. This means that your website, the staff you hire and train, the condition of your boats, the quality of your dockside safety briefings, the ease of getting help if something does go wrong - *the entire rental experience* – all reflect safety as your top priority. Rental agencies have found a high priority on safety contributes to clients having an enjoyable, accident free experience, and generates repeat or word of mouth business.

You and everyone providing client services know and understand their responsibilities and obligations, federally, provincially and locally. You make it a priority to be informed about boating laws and regulations that affect both you and your clients. What's more, you keep yourself informed of any changes and updates from season to season. You are aware of any provincial or municipal requirements and by-laws for operating your business.

You carry the appropriate insurance and follow the advice of your insurance broker in assessing and reducing risks in your rental boat business. Some rental agencies have found it is best to have an overall insurance for the business and make additional insurance options available for purchase by the renter. Most insurance companies require a business plan and will want to verify the safety measures you have in place to minimize risks.

ADMINISTRATIVE

Your administrative processes and related paperwork are client-focused and help to identify and minimize safety risks and protect your assets.

Here are the tips shared by seasoned rental boat agency owners:

Although you may find yourself eager to get started with renting your boats as soon as possible, taking time to get organized with administration and documentation is essential for client safety and the long-term success of your rental business. It will also save you valuable time when the season gets busy! Client guidelines, the length of your rental season, plus the number and types of boats available for rent, will help you decide on the type of administrative tools you need to have to keep things running smoothly when the season gets busy, as well as help determine your staffing needs.

Establish clear guidelines for clients renting your boats and clearly communicate these in any promotional materials and include them in a rental contract. Considerations for the kinds of things to include in your contract may include:

- personal information that includes name and address of client, cell phone number and emergency contact information
- proof of competency requirements for all motorized boats, and whether or not you will offer a Rental Boat Safety Checklist as a temporary proof of competency
- minimum age requirements for rental clients
- payment and/or security deposit requirements for the rental, and whether you accept credit card and/or cash deposits

- insurance options
- terms of the rental period, what is included (for example, fuelling, a list of safety equipment provided), and what's expected of the client
- who needs to attend safety briefings and why these are important
- rental booking procedures and confirmation
- if there are be any rental agency specific services, policies or restrictions related to towing, night operation, alcohol on board, multiple operators, lifejacket wear, etc.

Stakeholders noted that the lack of lifejacket wear and the use of alcohol are two key factors in most boating accidents. They suggested a strong policy related to these two behaviours as an important way to minimize risks in your rental business.

Have the appropriate administrative paper or electronic to track client services and streamline paperwork pertaining to the client as much as possible. Provide any completed forms to the client, and keep a copy for your records. Forms should address the following:

- Provide a rental agreement or contract with the customer's personal information including age, address, and cell phone number (which can double as a communication tool for emergencies in many areas). You can use the agreement to describe any agency-specific restrictions such as area of operation, night operation, towing, speed restrictions, alcohol use, lifejacket wear, etc., or provide it as a separate handout.
- Confirm the renter has received an appropriate safety briefing, or completed a Rental Boat Safety Checklist. Refer to Appendix for the Transport Canada pre-ready rental safety checklists that are available for use or Section A of the *Rental Boat Safety Standard* for guidelines for creating your own checklists).
- Document the details of the rental boat and safety equipment provided to the client.
- If applicable, document purchase of any onsite insurance that the customer added to their rental agreement.

Keeping good administrative records pertaining to client services, staffing, and equipment maintenance is an area seasoned rental agencies have found to help with consistency of their operation because it has helped them review, update and make improvements to their business. This process also gives rental agency owners peace of mind that they are minimizing risk of incidents and resulting claims. They noted that insurance underwriters most commonly ask to see these types of records:

- Staff training records and evaluations

- Staff procedure manuals, including a detailed outline used for client safety briefings
- Completed rental agreements, proof of competency verification, and documented safety orientation
- Checklists used for verification of safety equipment
- Checklists used for maintenance of boats, engines and equipment
- Client feedback or client satisfaction survey results

STAFFING

Staff who interact with rental clients know how each type of boat handles, can communicate and demonstrate that knowledge to clients, and have practical knowledge of the hazards in waterways where the boats will be operated.

Here are the tips shared by seasoned rental boat agency owners:

- Hire staff whose training and experience compliment the types of boats you make available for rent. Prerequisite training and qualifications may vary, but at a minimum should include a Pleasure Craft Operator Card. You may prefer additional training such as certificates issued by nationally recognized boating safety organizations or marine training institutes as a testament to your staff's knowledge and competency level.
- Staff tasked with the responsibility of maintaining the boat or giving safety briefings, need to have a good working knowledge of the boat, especially its handling characteristics. Top notch staff should be confident and competent in handling the boats they will be handing over to clients after the appropriate safety briefing.
- Rental agency owners valued staff with boating knowledge and experience on those stretches of water where the rental operations are being offered because they can more easily pass that information down to clients. Staff members should understand basic navigation principals and should also have a good understanding of the various weather conditions that may impact the rental operations.
- Invest time in staff training before the season starts. No matter the size of the rental business, rental agency owners who take the time to train staff on providing the best possible experience for their clients find this investment helps to ensure their rental services are consistent, credible and safety-focused. Training should provide a thorough review of everyone's roles and responsibilities, as well as performance expectations, and any specific job-related procedures or record keeping requirements. Owners found that having a staff training manual that includes all the procedures and checklists for the business provides a good base for the training and for staff to understand what they

need to do in their day-to-day job. Staff training sessions can be complimented by training videos created by the manufacturer of your specific boat, engine and equipment, or other appropriate sources (for example, Canadian Safe Boating Council, Transport Canada).

- Coach, mentor, and monitor your staff to ensure they are fulfilling their responsibilities and obligations as agreed upon. Owners found that time spent with staff on-the-job helped to identify any problems and issues early on and keep a focus on prevention and client safety.

CLIENT SCREENING

All of your clients are screened for proof of competency, boat operator experience (for the type of boat being rented), and local waterway knowledge to best determine whether they need a basic safety briefing or the detailed briefing of the Rental Boat Safety Checklist.

Here are the tips shared by seasoned rental boat agency owners:

The key to client screening is to ask the right questions to help assess the client's ability to be safe and responsible while operating your rental boat.

- Find out about their boating safety training, and if they have a Pleasure Craft Operator Card or other training certificate. It is important to remember that having a Pleasure Craft Operator Card means that the individual has some basic knowledge of boating safety. It is not an indication of a person's boating experience, boat handling skills, or familiarity with local waterways hazards, which is why you need to ask about these things!
- Ask about previous boating experience and what types of boats they have used.
- Ask about their knowledge of the local waterways, which is especially important if there is a lot of activity on the water. If your clients are from overseas, you'll need to spend extra time reviewing any lateral buoys or markings because depending on where they are from, the *direction* indicated by them is *reversed*.
- Depending on the activity, you will also want to be sure that person is physically able to perform the tasks associated with the type of boat and conditions they will be operating in.

- Determine if there are language or special learning needs that require extra attention during a safety briefing.

Asking the right questions will help your staff get the information they need to tailor the safety briefing to the clients most important safety needs.

Some rental agencies have offered discounts to individuals already possessing proof of competency, such as a Pleasure Craft Operator Card.

CLIENT SAFETY BRIEFINGS

All clients receive a basic safety briefing before getting underway.

Here are the tips shared by seasoned rental boat agency owners:

Deliver safety briefings to every client, regardless of proof of competency. (Remember, a Pleasure Craft Operator Card means a person has passed written test on basic boating safety knowledge. It does not indicate boating experience, boat handling skills, or knowledge of local waterways.)

Rental agencies have found it helpful to let clients know about safety briefings and their importance ahead of time. Messages like *"We provide safety briefings to all renters responsible for the operation of the rental boat"* or *"For your safety, all renters must complete a safety briefing before getting underway"* can be placed on signage at the rental location, posted on your website, and put on promotional handouts and advertising. Encourage clients to visit your website to review your rental agency's safety information as this may save them time at the dock.

Tailor safety briefings to show how to operate the boat and use the safety equipment, identify potential hazards in the area of operation, and review what to do in case of an emergency. You should also include any communication equipment and procedures specific to your operation. The safety briefing is also the time to promote and encourage key client safety behaviours, such as wearing lifejackets and not consuming alcohol.

Good safety briefings involve two-way communication between the staff member and client(s). They can be done one-on-one, or in small groups. The best safety briefings also incorporate a hands-on component. This is particularly important if the operator has little experience in running a particular type of boat. At the end of the safety briefing, the rental agent needs to be confident that the client can actually handle the boat safely and responsibly.

Use a checklist as a guideline for all your safety briefings. The Rental Safety Checklists provided by Transport Canada can be used for this purpose, or you can design your own checklists specific to your operation. A personally developed checklist must also meet Transport Canada criteria in addition to information pertinent to your area of operation. If your client does **not** already have proof of competency, then be sure and use the **Transport Canada Rental Safety Checklist** during the safety briefing as it includes all the items you need to review and/or demonstrate. Once completed, the checklist is your client's proof of competency for the rental period and must be carried on board.

Be prepared to say "no" for safety reasons, even if a client is good to go. Remember you have the final say in whether or not to hand over a boat to a prospective client. If you have *any* doubts at all about the client's ability to handle a boat responsibly and safely, do not hesitate to NOT rent to that client. Economically it can be discouraging to turn away a potential client; however, on those occasions where safety may be in doubt, seasoned rental agencies have found it's just not worth the risk to their companies' liability, and credibility. One agency owner summed it up this way: *It's OK to say no to some clients. If you end up involved in a rescue, or assisting rescuers, ambulances, investigators and dealing with upset clients and families, it's not just bad for you but the industry as a whole.*

LOCAL KNOWLEDGE

Foster good working relationships with other waterway businesses, users and service providers and access local knowledge to benefit the safety of your clients.

Here are the tips shared by seasoned rental boat agency owners:

Rental agencies foster mutually beneficial working relationships with other business and services on their waterways. These relationships become an important resource for local safety information and an early warning system to help identify and address common issues and concerns.

Rental agency owners found that good relationships means these other businesses and service providers will be on the lookout for ways to help your clients. They referred to many instances where these "community members" provided advice or help to rental clients when they were out on the water, docking, fueling, entering or exiting locks, navigating in unfamiliar areas, etc.. Rental agencies along the Trent Severn Waterway remarked on the support and assistance lockmasters provide to rental clients entering and exiting the locks. Lockmasters would often call the rental agencies to advise when the winds were too high for their clients to come through, reducing potential damage to boats and locks.

Access your local networks to identify local information that can be incorporated into your safety briefings. For example:

- posted vessel operation restrictions (speed restrictions or other)
- local marina "no wake zones"
- local bird nesting areas (time of year nesting-keep clear areas)
- swimming areas (keep clear or avoid)
- areas with locks

Use a variety of methods such as charts, pictures, videos, maps, or custom-made tools to help rental clients easily recognize hazards, buoys, recommended areas of operation, suggested routes, safe pull-outs, safe anchorage sites, and other local waterway information. One rental agency noted that after creating a customized brochure handout with a chart/map of the area showing the preferred channel, hazards and other key information, regular damage to boats and propellers was significantly reduced.

Monitor any changes in local hazards and weather and provide this updated information to your clients with each rental safety briefing. If poor conditions exist or are forecasted for the rental period, agency owners recommended services be suspended until conditions improve.

SAFETY EQUIPMENT

Supply all the *required* safety equipment for the type of boat with each rental.

Here are the tips shared by seasoned rental boat agency owners:

Supply all the *required* safety equipment for the type of boat with each rental. First verify what minimum safety equipment is required for the type and size of boat. (Check Transport Canada Office of Boating Safety website to get a full list www.tc.gc.ca.) Then keep an inventory of safety equipment for all the types of boats you have available for rent.

Consider providing additional equipment that may enhance the clients comfort and safety on the water. This of course will depend on the type of boat and area of operation. The most common extras mentioned by rental agencies were: tool kit, spare parts, extra spark plugs, extra flashlight batteries, first aid kit.

Have a variety of styles and sizes of lifejackets and PFD's available to clients so they can pick one that fits well and suits their activity. Your clients will be more likely to wear their lifejacket if it fits well and is comfortable.

EQUIPMENT MAINTENANCE

You have a system in place for regularly checking and maintaining the condition of all your rental boats, motors and safety equipment.

Here are the tips shared by seasoned rental boat agency owners:

Use maintenance checklists for your boats, motors and safety equipment. Rental agencies found these checklists, used routinely, helped to keep them on top of normal maintenance but also helped to identify any new issues that need to be addressed. Checklists should include periodic maintenance and safety equipment checks identified for pre-season, during the season (such as daily, weekly or pre-post rental) and end of season inspections. Keep records of any routine maintenance and repairs. Here are the kinds of things that were most commonly found in checklists:

- Check the hull and check for cracks or other damage and daily wear.
- For power-driven boats, check all electrical, fuel, propulsion and cooling systems and make sure the throttle is operating smoothly and is not sticking or binding.
- Make sure the steering is working properly.
- Check the oil and fuel levels. A good rule of thumb for fuel is: one-third for the trip out, one-third for the return and one-third as reserve.
- Check all hoses and lines for leaks or cracks and replace if necessary.
- Make sure all clamps and belts are secure and in good shape.
- Inspect, clean and replace spark plugs if necessary.
- Check and change oil and water filters if necessary.
- Check the battery's charge and its fluid levels.
- Be certain the drainage plug is in place.
- Verify the maximum load on your boat and communicate this to clients during the safety briefing.
- Refer to the manufactures manual for periodic inspections of the boats, hull, and machinery and make check lists that are relevant to your boats and area of operation.

Obtain customer feedback for boat performance and operation and conduct an inspection with each rental return.

Check safety equipment for wear and tear following every rental, repairing or replacing equipment as needed. A customized checklist tailored to your rental operation is a helpful tool

to ensure the right safety equipment is always ready and available and in good condition for the right boat. Here are some examples of the types of things to check for:

- All lifejackets are returned in good condition.
- Lifejacket straps, clasps and zippers are still functional.
- Throw lines, anchor lines, securing lines are still of appropriate length, in good repair and accessible.
- Anchors have chain and are secured properly with a shackle.
- Paddles are not cracked and are in easily accessible location.
- If equipped with navigation lights, ensure they work and are clearly visible. Have replacement bulbs and fuses available.
- Expired marine flares are replaced as required.
- Batteries on flashlights, cell phones and any other electronics aboard are replaced as required.

EMERGENCY PREPAREDNESS

You have anticipated the types of emergency situations that might arise and your staff and clients know what to do if an emergency were to occur.

Here are the tips shared by seasoned rental boat agency owners:

Anticipate the potential emergencies that may arise in your rental business and have an appropriate (written) plan and in place to respond to these emergency situations. Here are some helpful considerations when preparing and customizing your emergency plan:

- Consider different emergency scenarios, such as break-down, fuel problem, injury, man-overboard, capsize, grounding, weather delays, etc.
- Identify a boat to be available at all times to respond to emergencies as well as trained staff who can reach the client and provide mechanical assistance.
- Know what your capacity is to tow the rental boat back or leave it secure and bring back the clients.
- Identify safe pull out spots for the clients should there be a need to pull out, stop or hold up due to weather changes or other unforeseen emergencies.
- Identify emergency responders for your area (Coast Guard, local police or fire department?) Do they have boats to cover your area? Identify how to reach these emergency responders in the event the rescue is beyond the means of your boat and or staff's capabilities.
- Identify a dedicated phone number or VHF radio frequency used for emergencies only and ensure clients can contact it any time during the rental period and expect an

immediate response. Staff monitoring the emergency number or frequency should know how to capture key information and activate protocols for arranging for assistance.

- In remote areas where cell phones or VHF radios are not within range, have a back-up plan for emergency situations, for example, pre-established check-in periods ashore, provision of satellite phone, agreed upon date and time of return, etc.
- Use a client monitoring system, such as an IN-OUT board, to help you be alerted to potential safety problems if a client does not return when scheduled.

Keep good client records to assist if an emergency arises. Ensure a rental agreement, Rental Safety Checklist and/or other appropriate documentation is kept onshore and includes the following information:

- name and address of the operator (Verify through ID)
- number of people on board
- description of the boat and equipment provided
- the Pleasure Craft License number or rental boat inventory number so that the boat is easily recognized in case of emergency
- the intended area of operation and expected time and date of return
- a documented emergency plan for what happens if the renter does not return at the agreed time or place

EMERGENCY COMMUNICATION

Your rental clients have an appropriate device to communicate with the rental agency ashore in the event of an emergency and know how and when use the device.

Here are the tips shared by seasoned rental boat agency owners:

The first step is to verify which communication tool is most suitable for your area and provides the most direct means of communication in the event of an emergency.

Emergency contact information should be written down and placed in key locations within the boat, for example:

- with the communication tool being provided
- on key safety equipment such as on lifejackets and paddles
- on the hull of the boat close to the area where the operator will be seated
- on the rental agreement and, when used, the Rental Safety Checklist

For remotely operated activities (those that are not in visual contact), two reliable forms of marine communication are recommended, such as a distress beacon, waterproof VHF hand-held radio, satellite phone, a high intensity flashlight or strobe light, air horn, flares and/or whistle.

Place cell phones, satellite phones or any other form of non-waterproof device inside a plastic bag or waterproof container so that they can still be operated or accessed during an emergency on the water. Some rental agencies also make cell phones available for rent along with specially designed waterproof bags.

Always provide instructions on *how* to use the devices and *when* to use them during the safety briefing. Remember to clearly explain the limitations of any communications devices provided, for example, cell phone coverage may be inconsistent in some areas and may not always be available when an emergency happens. As well, VHF radio coverage can be very limited on inland waterways.

When cell phones are the primary communication tool for your agency, it is important to determine which numbers to use in your area to activate rescue services (for example, *16 or #16 service to place a distress call directly to the Canadian Coast Guard Communications and Traffic Services, or 911 depending on which agency covers your area.).

SUMMARY OF BEST PRACTICES

SAFETY

Your rental boat business reflects a culture of safety, with client safety being the top priority.

ADMINISTRATIVE

Your administrative processes and related paperwork are client-focused and help to identify and minimize safety risks and protect your assets.

STAFFING

Staff who interact with rental clients know how each type of boat handles, can communicate and demonstrate that knowledge to clients, and have practical knowledge of the hazards in waterways where the boats will be operated.

CLIENT SCREENING

All of your clients are screened for proof of competency, boat operator experience (for the type of boat being rented), and local waterway knowledge to best determine whether they need a basic safety briefing or the detailed briefing of the Rental Boat Safety Checklist.

CLIENT SAFETY BRIEFINGS

All clients receive a basic safety briefing before getting underway.

LOCAL KNOWLEDGE

Foster good working relationships with other waterway businesses, users and service providers and access local knowledge to benefit the safety of your clients.

SAFETY EQUIPMENT

Supply all the *required* safety equipment for the type of boat with each rental.

EQUIPMENT MAINTENANCE

You have a system in place for regularly checking and maintaining the condition of all your rental boats, motors and safety equipment.

EMERGENCY PREPAREDNESS

You have anticipated the types of emergency situations that might arise and your staff and clients know what to do if an emergency were to occur.

EMERGENCY COMMUNICATION

Your rental clients have an appropriate device to communicate with the rental agency ashore in the event of an emergency and know how and when use the device.

RENTAL BOAT SAFETY BEST PRACTICES FEEDBACK FORM

Thank-you for your interest in reviewing *Rental Boat Safety Best Practices (DRAFT)*. Transport Canada values your input. We very much appreciate if you would complete the feedback form below.

Please indicate your level of agreement with the following statements:

1. The best practices are easy to read and understand.

☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

2. The best practices apply to different types and sizes of rental boat agencies.

☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

3. It makes sense for rental boat agencies to follow and implement these best practices.

☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

4. The best practices include information that is unnecessary or irrelevant.

☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

5. It will be difficult for rental boat agencies to implement these best practices.
☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

6. These best practices will help rental boat businesses strengthen customer service and customer safety.
☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

7. Implementing these best practices will help improve safety on the water.
☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments:

8. There is important information missing from these best practices.
☐ Strongly Agree ☐ Agree ☐ Somewhat Agree ☐ Disagree ☐ Strongly Disagree

Comments

Rental Boat Safety Standard

Transport Canada is currently revising the Rental Boat Safety Standard. It will be available for review at a later date.

Would you like to receive a copy of the Rental Boat Safety Standard for review once it is completed?

☐ Yes

☐ No

Do you have any suggestions on how Transport Canada could share new information with rental boat agencies?

☐ Yes

☐ No

Comments:

Self-Identification

Please check the box that most closely identifies you.

- ☐ Rental Agency Owner
- ☐ Rental Agency Staff
- ☐ Rental Boat Agency Customer
- ☐ Recreational Boater
- ☐ Insurance Provider
- ☐ Enforcement Officer
- ☐ Boating Safety Educator
- ☐ Course Provider
- ☐ Government Agency (specify) _____
- ☐ Other (specify) _____

For Rental Agencies Only

What type of boats do you rent?

- ☐ Tiller-Steered
- ☐ Wheel-Steered
- ☐ Personal Watercraft (PWC)
- ☐ Pontoon
- ☐ House/Cabin Boat
- ☐ Canoe/Kayak
- ☐ Stand-up Paddleboards
- ☐ Small Sailboats
- ☐ Other (specify) _____

Your name: _____

Contact Information: _____

☐ Yes, add me to your email list for rental boat safety updates. Email: _____

Send Completed Form by June 30, 2015 to:

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