

# OCBC-Lake Hefner Handicap Rating Committee Guidelines September 30, 2015

---

- 1. INTRODUCTION.** These Guidelines were developed by the 2012 Handicap Rating Committee (HRC) of the Oklahoma City Boat Club (OCBC). This revision was prepared by the 2015 HRC to incorporate information in the OCBC-Lake Hefner Handicap Rating Bylaws dated February 6, 2015 and other information affecting Committee operating procedures.

These Guidelines are maintained and used by the HRC to determine and administer the handicaps for the OCBC-Lake Hefner Performance Handicap Racing Fleet (PHRF) rating system for keelboats and sportboats and the Portsmouth Yardstick rating system for centerboards and multihulls.

**Info:** While the US SAILING PHRF numbers also include multihulls greater than 20 feet in length, all multihulls participating in OCBC races and regattas are scored under the Portsmouth Yardstick system; unless the Committee decides to also issue a Temporary PHRF number to a larger multihull as was done for the F-28R Trimaran by the 2012 Committee to see if it can compete fairly with keelboats. To date, the F-28R has not competed in sufficient races to determine whether or not it can compete fairly with keelboats/sportboats.

- 2. ROLE OF THE COMMITTEE.** Update, when necessary, the OCBC-Lake Hefner Handicap Rating Bylaws, administer the Handicap Rating systems used for OCBC races and regattas, determine the PHRF Time-On-Time Correction Factor (TCF) used in the scoring program, develop the Base and Valid PHRF handicap numbers and ensure the Portsmouth Yardstick handicap numbers used at OCBC are up-to-date with those in the US Sailing Current Tables.

The PHRF Time-On-Time Correction Factor (TCF) used in the scoring program to convert elapsed time to corrected time is:  **$TCF = A/(550 + PHRF)$** . Our committee establishes the "Scratch PHRF" number, which will result in the corrected time being the same as the elapsed time. "A" in the formula is then selected to attain this result. Then, boats with a lower valid PHRF will have their corrected time increased and boats with a higher valid PHRF will have their corrected time lowered. **Note:** This is a key handicapping element so our committee must analyze our fleet, past race results and available data sources; such as, US SAILING and fleets with sailing conditions similar to ours to determine the best possible "scratch PHRF" number for use on Lake Hefner.

**The "Scratch PHRF" being used at this time is 168; so, the "Scratch PHRF" formula in the scoring program is:**

$$TCF = 718/(550 + 168)$$

A primer on Time-On-Time scoring by Bob Porter, PHRF Lake Ontario, is on the US SAILING PHRF page.

- 3. RELATIONSHIP BETWEEN OUR COMMITTEE and the RACE and REGATTA COMMITTEES.** Our Committee establishes and monitors the handicap numbers of the individual boats and provides the Race Committee the PHRF Time-On-Time Correction Factor formula, the Valid PHRF numbers and the Portsmouth Yardstick numbers to be used for scoring. Our Committee provides a PHRF list of owners, their boat class, sail number, boat name and valid handicap number to the Race and Regatta Committee Chairs for their use in planning and conducting races and regattas. The Race Committee is responsible for grouping like boats for starting and scoring purposes to assure fair racing for the competitors and is responsible for providing accurate documentation to the Scorer. Our Committee Chair coordinates with the Race Committee Chair to have wind speeds, boat classes in each start and length of

courses for each start recorded on the scoring sheets. This is essential to provide the additional information about the racing conditions our Committee needs for analysis of race results at our annual and periodic rating reviews.

**4. ANNUAL GUIDELINES REVIEW.** These guidelines must be reviewed soon after the new Handicap Rating Committee is formed. The review is to incorporate procedure changes needed due to changes to the Handicap Racing Bylaws, lessons learned, and any changes at the national and local levels the Committee considers appropriate.

**5. ANNUAL and MID-SEASON RATING REVIEWS.**

- a. An **Annual Ratings Review** is required in accordance with Article VIII, Section 6 of the OCBC Bylaws and should be done soon after the new Handicap Rating Committee is formed.
  - 1) For PHRF boats, the review should include soliciting information from the Fleet, the Regatta Committee and the Race Committee as to the success of the previous season and any potential rating inequities. After an overall review of the past season, any changes to ratings are addressed and any rating changes provided to affected boat owners and a highlighted copy to the Race Committee Chair so the scoring program can be updated. Also, Appendix A to the Bylaws must be updated if any changes were made to the Adjustments to Base Handicaps.
  - 2) For centerboards and multihulls, review last year's race results to see if there are any boats that raced and are not on Appendix B to the Bylaws. Then, check the US SAILING Portsmouth Yardstick "Current Tables" for the data for any new boats and to see if any changes have been made to the data for boats already on Appendix B. Appendix B to the Bylaws must be updated with any new boats and any wind rating changes to existing boats. Then, a copy with new/changed data highlighted must be provided to the Race Committee Chair so the scoring program can be updated.
- b. **Mid-Season Review and Updating of PHRF Ratings**- Rather than relying on individuals to complain about inequities, our committee should set a mid-season review date, review the actual race results for the first part of the season, address any issues found and coordinate any needed rating changes with the Race Committee Chair.

**6. SAILORS NEW TO RACING.** Those new to racing are generally unfamiliar with the rating systems used at OCBC and can benefit from existing information available to them to become knowledgeable. The Committee should encourage new members to our fleets to become familiar with OCBC and US SAILING handicapping information available at our OCBC website ([www.okcboatclub.com](http://www.okcboatclub.com)) under the Handicapping tab.

**7. OUR COMMITTEE ASSIGNS TEMPORARY RATINGS for REGATTAS and VALID RATINGS for CLUB SERIES RACES:**

- a. **Regattas.** To support regatta planning, our Chair must advise the Regatta Chair who from our Committee will be available to assign a temporary handicap number if a boat arrives to race and that boat's class isn't on our local ratings lists. So, our Committee representative must be available during registration in case a temporary rating is needed. It is recommended our representative have PHRF and Portsmouth data on a laptop computer for easy reference. This should be the Handicap Racing Bylaws with the current Appendices, these Guidelines, our Valid Ratings list for our PHRF keelboats/sportboats, the link to the OCBC and US SAILING home pages and any other relevant information. And, blank PHRF rating forms must be available. If copies aren't on the bulletin board, copies should be in our Committee's locker in the clubhouse.

- b. **Club Series Races.** Anyone belonging to a recognized sailing organization, who wishes to participate has always been welcomed as long as they comply with the Race Committee's requests and directions. However, keelboats and sportboats participating in club series races can't be scored until they submit a PHRF rating request and have been given a valid rating certificate. Centerboard and multihull participants who provide the RC with their boat's class, sail number and skipper's name and their class is on our local Portsmouth Yardstick list could be scored if the Race Committee decides to so. A boat class not on our local Portsmouth list will have to be added by our Committee before it should be scored.

**8. LOCAL DECISION REGARDING a SEPARATE RATING for NON-SPINNAKER BOATS.** Since the Standard Production Boat is assumed to have a spinnaker, the question has been raised to our Committee asking if boats racing Non-Spinnaker could receive a credit to their rating, i.e. a different rating, when grouped with Spinnaker boats. We're been advised the scoring program currently being used will not allow more than one valid rating per boat. So, a Non-Spinnaker boat grouped with Spinnaker boats cannot receive a credit at this time. This is subject to change in the future if the Race Committee advises the scoring program can accept more than one valid rating per boat.

**9. SPORTSMANSHIP ISSUES.** Some clubs have written policies regarding stripping a boat for racing, carrying a token motor or weight instead of the one required by their boat's class rules, etc. Rather than trying to have written policies in place covering all possibilities, it's the practice at OCBC to handle sportsmanship issues informally with a warning and allow the competitor to respond before formal action is taken. Also, these type issues could be protested during a race/regatta, particularly when large prizes are offered. If a protest is lodged, the Race and Protest Committees should handle it.

**10. PERFORMANCE HANDICAP RACING FLEET (PHRF).** PHRF is a locally administered handicapping system that uses the perceived speed potential of a keelboat/sportboat as the basis for the handicap.

**10a. PHRF RATING PROCESS.** The process for determining an OCBC-Lake Hefner PHRF rating for a keelboat/sportboat begins with determining its Base Handicap rating.

**(1) The Committee uses all of the information available when determining Base Ratings, including:**

- A) The Critical Dimensions for Standard Production Boats. These files can be found on the US SAILING website under Offshore-PHRF.
- B) Selection of Reference Clubs for Validating our Local PHRF Ratings.

**I. The History of US PHRF Affiliated Fleet Handicap Members** (the Red, White & Blue Handbook) lists all reported data from the member clubs of the boats raced in the country. The PHRF Handicaps Book can be found on the US SAILING website under Offshore-PHRF.

**II. Choosing Area Clubs with Similar Sailing Conditions and Fleets.** Our PHRF boats are 17 to 33 feet in length and our sailing conditions range from 5-25 mph on a 2-mile diameter lake, generally sailing Windward/Leeward one-hour courses for keelboats/sportboats and/or triangular courses for keelboats/sportboats, centerboards and multihulls. Windward legs are adjusted to the wind conditions and typically vary from .5 to 1.5 miles in length. We tend to sail in higher wind conditions than many clubs. Examples of area clubs that may be similar for comparison are Rush Creek Yacht Club, Dallas Corinthian Yacht Club, Fort Worth Boat Club, Ninnescah Sailing Association and Windycrest Sailing Club.

### III. Close attention is needed to the sailing conditions of the reference fleets.

- 1) Mountain fleets likely do not fit our profile as high altitude dramatically affects the difference in sail plans and overall boat performance.
- 2) Ocean fleets generally have bigger waves and chop than Lake Hefner and current.
- 3) Some fleets have predominantly higher or lower winds than we normally sail in; and, sometimes different courses.
- 4) **Clubs vary in their handicapping skill sets.** It is recommended a personal call be made to the Handicap Chair of a club to be used, as a reference to assure the information being sought is valid for our Fleet.

**10b. No other like or similar boat is available in the PHRF community.** In these rare instances, check the US SAILING Portsmouth Yardstick data for offshore and keelboat classes. If the boat is listed, its DPN number can be used in the US SAILING formula,  $PHRF = (6 \times DPN) + 55$ , to yield a **beginning reference point** for determining a Base PHRF number. If the boat is or isn't listed, the Committee must always use its collective knowledge to determine the final Base rating. Once the Base rating is established, the Committee then makes any adjustments to the Base Rating using Appendix A to the Fleet Bylaws. The result is the boat's Valid Oklahoma City-Lake Hefner PHRF Handicap Rating.

**10c. INCOMPLETE PHRF RATING REQUESTS.** The original certificate form is filled out by the owner(s) to the best of their ability. In some cases, they are inexperienced in PHRF rating or the basic requirements for a Standard Production Boat resulting in the Committee not receiving all information needed to assign a rating. In these cases:

- a. A member of the Committee who is familiar with the boat being rated should look at the boat and add comments to the rating form when there is a question about the correct classification.
- b. When there is a question about sails, a designated measurer from the affected fleet should do the actual measurements. Their measurer is familiar with the critical measurements for compliance to the class rules and exceptions.

**10d. BOATS GIVEN A TEMPORARY PHRF RATING.** The rating must be reviewed after six (6) races and a valid rating certificate issued.

**10e. HANDLING PHRF RATING APPEALS.** Follow the procedures in Article III, Section 6 of the Handicap Racing Bylaws.

**11. PORTSMOUTH YARDSTICK SYSTEM.** The US SAILING Portsmouth Yardstick is a widely used method of rating boats of different classes sailing the same course. It is derived from actual records of classes of boats with thoroughly documented ratings.

**At OCBC, the Portsmouth Yardstick rating system** is currently being used to score Centerboards and Multihulls. US SAILING has available the conversion factor between the two systems, which may be used when the boats are raced together in a combined fleet. The Portsmouth system has different ratings for various wind ranges, which is intended to adjust for how each boat performs in varying wind conditions. Portsmouth also has some permitted rating adjustments but these are not currently applied at OCBC. **Our Committee assigns Portsmouth Yardstick numbers for centerboards and multihulls and they are listed in Appendix B to the Handicap Racing Bylaws.**

**12. GOLF RATING SYSTEM.** At OCBC, this system is not currently used but as the name implies, it was developed around rating the individual skipper, crew and boat performance against all others racing. It is used for fun racing rather than highly competitive racing. The basic philosophy is to create a system where all those racing would be assigned a handicap number that would allow them to win. Although this may seem to be a more sporting method of handicapping, the variables in managing this are very difficult to be done with any degree of accuracy. Obviously, a new skipper whose skills would improve much faster than an experienced sailor would be greatly advantaged under this system. Similarly, a boat rated with old sails that gets a better or new set, would be advantaged. Finally, replacing an inexperienced skipper with one much more experienced would quickly move the boat up in the fleet.

**13. POSSIBLE FUTURE STUDY AREAS.**

- a. **PHRF Time-On-Distance-** Since we have the capability to measure the length of our race courses, it may be worthwhile to score using both methods and see what differences result. Arguments for TOT are that it does not affect the top and bottom of the finishing positions, but does some in the middle. It is also said to compensate somewhat for the wind conditions and the advantage slow boats have in light air days.
- b. **Portsmouth Yardstick** is a system that makes allowances for boat performance in various (Low-Medium-High) wind ranges. Over the past 20 years, the PHRF Mean numbers for many PHRF boats have become closer to those in Portsmouth. Again, a comparison study of results might be interesting to determine if a return to using the Portsmouth system for keelboats/sportboats would be suitable for our local races since that system provides adjusts for varying wind speeds and some modifications for variances in boat configurations.

**14. HANDICAP RATING COMMITTEE SIGNIFICANT EVENTS TIMELINE**

**OCTOBER-NOVEMBER**

Commodore appoints Committee Chair. Chair assembles committee and the chair and its members confirmed by the Board of Governors (BOG).

**NOVEMBER-DECEMBER**

Chair, with assistance of the Secretary as needed, reviews the list of National Class Rules on the OCBC website for boats being sailed in the OCBC-Lake Hefner PHRF Fleet and updates the list as additional Class Rules are found.

Chair contacts the US SAILING PHRF Committee's "Staff Contact" to obtain guidance for submitting our year-end Base Rating data. Contact information can be found on the US SAILING website under Offshore, then PHRF. The "Staff Contact" is at the bottom of the list of PHRF committee members. As of the date of these Guidelines, Donna Leary is the contact.

Chair, with assistance of the Secretary as needed, assembles and submits our year-end Base Ratings for boats in the OCBC-Lake Hefner PHRF to US SAILING.

Chair coordinates with OCBC Treasurer to have the annual membership payment sent to US SAILING to continue OCBC membership as a US SAILING PHRF Participating Club.

## DECEMBER-FEBRUARY

Committee reviews the Handicap Rating Bylaws, makes any needed changes to ensure a fair playing field for competition on Lake Hefner and submits the revised Bylaws to the BOG for approval. Committee reviews Appendix A and B to the Bylaws and makes any needed changes. (Approved Bylaws and changed Appendices must be provided to the Roster preparer **no later than** 31 March-See last item under FEBRUARY-MARCH).

Committee reviews these Handicap Committee Guidelines and incorporates procedure changes needed due to changes to the Bylaws and/or Appendices, lessons learned, and any changes at the national and local levels considered appropriate to racing on Lake Hefner.

## FEBRUARY-MARCH

Inspect boats stored on trailers for modifications or changes not shown on their certificate that might affect their rating (winter is a good time to do this since hull, keel and propeller discrepancies will be visible).

Review performance of boats over the past season to determine if any rating modifications are needed to support the goal of fair competition for all competitors. Verify the TOT Correction Factor (TCF) being used is still valid. If not, develop a new formula and provide it to the Race Committee Chair so the scoring program can be updated.

Review all PHRF certificates for accuracy, revise those needing adjustment of their valid rating and notify the owners. Notify the Race Committee Chair of the revised ratings and ratings for keelboats/sportboats new to the Fleet so the scoring program can be updated.

The scoring program must be updated when US SAILING Portsmouth Handicaps for Centerboards and Multihulls change and for boats new to the Fleet. Compare the US SAILING Portsmouth Handicap Current Tables for Centerboards and Multihulls against Appendix B to the Bylaws to see if an update is required. Also, check last year's race results to verify all participating boats are on Appendix B. If there are differences in Portsmouth numbers or boats, update Appendix B and provide a highlighted copy to the Race Committee Chair so the scoring program can be updated.

**If the Bylaws or Appendices were revised, the latest version must be provided to the person responsible for the OCBC Roster by 31 March to ensure the latest data is included. Also, provide a copy of the updated Bylaws, without Appendices, and, separately, the updated Appendices to the Webmaster for inclusion on the Club's website.**

Our Committee Chair coordinates with the Race Committee Chair to have wind speeds, boat classes in each start and length of courses for each start recorded on the scoring sheets. Having race conditions information provides a valuable tool when reviewing assigned handicaps during our annual and periodic rating reviews to decide which, if any, valid ratings need to be adjusted.

## APRIL

The Chair posts the final PHRF Base and Valid numbers data for keelboats/sportboats and the final Portsmouth numbers for centerboards and multihulls on the Handicap Rating Committee's portion of the Club's bulletin board. The Chair also provides a copy of the lists to the Webmaster for inclusion on the Club's website.

The Chair provides the PHRF Valid numbers list and the Portsmouth numbers list to the Race and Regatta Chairs.

#### **MAY-JUNE**

Address any problems requiring committee action.

#### **JULY-AUGUST**

Conduct mid-season review and change any ratings identified needing adjustment. Provide any changes to the owners and to the Race Committee Chair so the scoring program can be updated.

#### **SEPTEMBER-OCTOBER**

Complete end-of-year review and any other remaining issues requiring committee action.