

Winter Storage for Your Boat

Practical guide for owners

How to plan winter storage, compare quotations, approve work and reach launch with a clear view of activities and costs.



IN THE PACK

01 PRACTICAL GUIDE

02 OWNER TOOLKIT

FILLABLE PDF

HOW TO USE THE PACK

GUIDE + TOOLKIT

Understand first. Apply with confidence.

This guide explains the method. The second document in the pack - the Winter Storage Owner Toolkit - turns it into fillable sheets for quotations, boatyard handover, approvals, inspections and final cost close-out.

01**PRACTICAL GUIDE**

To understand the key decisions, common risks and how to manage winter storage as a process.

02**OWNER TOOLKIT**

To apply the method with checklists, boatyard comparison, handover, approvals, inspection log and final summary.

ONBOARD PRINCIPLE

The quoted storage price is not automatically the final storage cost. First define the scope of services; then compare prices.

The five-phase process

1**PREPARE****2****HAND OVER****3****MONITOR****4****PREPARE TO
LAUNCH****5****ARCHIVE**

WINTER STORAGE AS A PROCESS

01

Five phases, one control framework

Winter storage works better when it is treated not as one single line item, but as a sequence of decisions. Separating the phases makes responsibilities, activities, approvals and costs easier to document.

Well-managed winter storage does not end when the boat enters the yard. It ends when the boat is operational again and the technical and financial picture is closed.

PHASE	OBJECTIVE
PREPARE	Dates, boatyard, services, documents and known work.
HAND OVER	Boat condition, photos, haul-out, wash and first inspection.
MONITOR	Systems, work, approved extras and open costs.
PRE-LAUNCH	Close work, recommissioning, checks and payments.
ARCHIVE	Invoices, photos, notes and records for the next cycle.

OWNER INSIGHT

Separating storage, scheduled maintenance and additional work makes it easier to understand later why the final cost changed.

BEFORE HAUL-OUT

02

Prepare the storage period before the boat is moved

Much of the quality of winter storage is decided before haul-out. If dates, services and work are defined only once the boat is ashore, the owner loses comparison leverage and the risk of fragmented extras increases.

- Confirm expected haul-out, storage and launch dates in writing.
- Clarify what is included and what will be charged separately.
- Check charges for extended storage and additional movements.
- Define who may approve additional work and how.
- Keep the quotation, service terms and boatyard contacts.
- Prepare a list of known work and priorities to verify after haul-out.
- Photograph the general condition and areas affected by work.

IN THE TOOLKIT

The Pre-Haul Out Checklist records the status of each check and any notes to carry into the handover.

HAUL-OUT AND HANDOVER

03

Haul-out is also an inspection opportunity

Immediately after haul-out and hull washing, there is a valuable inspection window: the underwater hull, appendages and normally submerged components are accessible before new work begins.

OBSERVE AND DOCUMENT

- General hull condition and previous antifouling cycle.
- Anodes, propellers, shafts or sterndrives, rudders, trim tabs and thrusters.
- Seacocks, through-hulls and visible underwater components.
- Anomalies, impacts, delamination, corrosion or areas needing review.

BOATYARD HANDOVER

- Boat condition and photographic references.
- Requested work and tasks still to be assessed.
- Materials, keys and access items handed over.
- Rule for unquoted work and authorised decision-maker.

GOOD PRACTICE

A small set of dated photographs before and after key work is more useful than many generic notes. It helps reconstruct decisions and the condition of the boat.

ENGINES AND SYSTEMS

04

Lay-up procedures are not universal

Engines, generator, batteries and onboard systems respond differently to inactivity. The correct procedure depends on the boat configuration and the relevant manufacturer instructions.

TECHNICAL RULE

Use the pack as a management-control framework, not as a maintenance manual. Manufacturer procedures for the specific engines and onboard systems always take priority.

AREA	WHAT TO KEEP IN THE PLAN
Main engines	Scheduled maintenance and long-term lay-up procedures.
Generator	Checks and recommissioning according to manufacturer.
Batteries	Condition, charge maintenance, isolation and checks.
Water / sanitation	Management appropriate to climate and configuration.
Tanks / fuel	Prevention of contamination and condensation.
Bilges / pumps	Cleaning, dry condition and inspection method.
Other systems	Watermaker, air conditioning and specific systems.

WHY IT MATTERS

A generic procedure may be insufficient or, in some cases, simply wrong for a specific boat. What matters is knowing who follows which procedure and how it is documented.

INTERIORS, DECK AND HUMIDITY

05

Protection is more than simply closing the boat

A boat left unused for months can develop problems from condensation, poor ventilation, damp textiles, leaks or standing water. Protection from the elements should be balanced with a controlled, verifiable onboard environment.

- Remove food and materials that may deteriorate or attract pests.
- Prepare refrigerators, lockers, textiles and cushions for the storage conditions.
- Ensure covers and protection do not completely prevent ventilation.
- Define how leaks, bilges and humidity will be monitored.
- Protect exposed electronics and exterior components.
- Leave clear notes on systems shut down or altered for lay-up.

DO NOT ASSUME

If you want periodic checks during storage, agree who performs them, how often, which areas are checked and what must be reported.

READING THE QUOTATION

06

The price needs a clearly defined scope

The term winter storage can cover very different services. The quotation total is not enough: you need to know which parts of the storage cycle are included and which remain outside the scope.

ITEM	TO CLARIFY
Haul-out	Included / extra / conditions
Hull wash	Included after haul-out?
Cradle / supports	Included / rental / extra
Movements	Number included / extra rate
Storage	Period and pricing method
Security / care	Service actually provided
Water / power	Included / metered
Launch	Included in the initial price?

KEY QUESTION

What will I really spend from haul-out until the boat is ready to launch again?

COMPARING QUOTATIONS

07

Make quotations comparable before deciding

Two quotations are not comparable if they include different services. The first step is not to choose the lowest total, but to bring the proposals onto the same scope.

SERVICE	A	B	C
Shore storage	Yes	Yes	Yes
Haul-out	Extra	Yes	Yes
Wash	Extra	Yes	No
Cradle	Extra	Yes	Yes
Launch	Extra	Yes	Yes
Periodic checks	No	Yes	Extra

The four-step method

- 1Align the services
- 2Price the extras
- 3Review conditions and responsibilities
- 4Compare the like-for-like total

IN THE TOOLKIT

The Quotation Comparison sheet and Scorecard let you assess up to three boatyards on transparency, management of extras, security, communication and overall value.

APPROVALS AND COSTS

08

Budget, quoted, approved, paid and still outstanding

During winter storage, costs may change as additional work emerges or services are approved at different times. Recording only what has already been paid does not show the real financial exposure.

MEASURE	WHAT IT TELLS YOU
Budget	What you planned before the work started.
Quoted	What suppliers have quoted.
Approved	What you have actually approved.
Paid	What has already been paid.
Outstanding	Committed but not yet paid.
Variance	Difference between approved cost and budget.

OWNER INSIGHT

Paid cost records the past. Approved cost shows the commitment already made, even when some invoices have not yet arrived.

DURING STORAGE

09

Manage by exception, not by chasing every detail

The owner does not need to follow every activity in the yard. It is more effective to define in advance which events require an update or a new approval.

COST

Any activity beyond the agreed scope or approved amount should return to the owner for approval before execution.

TIME

Any delay that may affect launch or create additional cost should be reported as soon as it emerges.

CONDITION

Any technical anomaly or damage found after haul-out should be documented before repair, except where safety requires immediate action.

WHAT TO ARCHIVE

- Quotations and revisions.
- Work approvals.
- Before-and-after photographs.
- Reports or technical notes.
- Invoices and payments.
- Outstanding activities.

PRE-LAUNCH AND REDELIVERY

10

The final checklist should close the cycle

The most delicate point is not only haul-out: it is recommissioning. Before launch, confirm that approved work is closed, systems treated for lay-up are restored and no ambiguous tasks remain.

- Confirm completed work against approved work.
- Check hull, appendages, anodes and areas affected by work.
- Confirm recommissioning of engines, generator and systems under the applicable procedures.
- Check seacocks and components affected by work.
- Confirm launch date, conditions and responsibilities.
- After launch, check for leaks, anomalies and operation of affected systems.
- Record outstanding tasks and who is responsible for closing them.
- Update final costs, documentation and outstanding payments.

CLOSE-OUT

Winter storage is truly closed when the boat is operational again and the owner also knows the final financial position, not simply when the boat leaves the yard.

WINTER STORAGE PACK 02

FROM METHOD TO APPLICATION

Now use the Owner Toolkit.

The second document in the pack can be completed on a computer or tablet and can also be printed. It turns the principles in this guide into a clear operational record.

PRE-HAUL OUT

Preparation checklist and notes.

QUOTATIONS

Compare up to three boatyards.

SCORECARD

Assessment beyond price alone.

HANDOVER

Boat condition and items handed over.

APPROVALS

Additional work register.

INSPECTIONS

Inspection log during storage.

PRE-LAUNCH

Recommissioning check.

COSTS

Initial, extra and final cost summary.

FILLABLE PDF

Toolkit fields can be completed digitally, saved with your boat details and retained as a record of the storage period.

FINAL NOTES

A good season starts with how the previous one is closed.

The value of well-managed winter storage is not only technical. It is the ability to preserve the boat, plan work, limit financial surprises and start the next season with information in order.

OWNER SUMMARY

Before haul-out, define the scope. After haul-out, document. During storage, approve by exception. Before launch, close work and costs. Then archive.

USEFUL TECHNICAL REFERENCES

- Royal Yachting Association (RYA) - Winterising Top Tips
- Royal Yachting Association (RYA) - Winterising Your Boat Engine
- YANMAR Marine International - Operation Manuals and seasonal maintenance guidance
- BoatUS - The Boater's Guide to Winterizing

Note: this resource is for information and organisation only. It does not replace manufacturer manuals, technical inspections, boatyard instructions or professional advice. Each boat and onboard system may require different procedures depending on model, configuration, location and operating conditions.

**ONBOARD CLUB**

More control over your boat. More value in your decisions.