

Learning chess

**Manual for
chess trainers**

Step 2

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The second Step

We start from the standpoint that the lessons in this Step can only be of real use when children have previously successfully finished the first Step. This means more than a pass mark in the tests. The basic skills of the first Step also have to be **applied** by the children in their games. If the students have not mastered the necessary skills, then offering them new knowledge will only backfire.

For the teacher, this means that he has to be aware of the didactic approach which was described in the manual of Step 1.

In Manual Step 2, the stress is on enhancing the students' skills. The emphasis lies on attacking play. We teach about targets and attacking techniques because:

- further mastery of the material becomes possible (winning material cleverly);
- in chess, the attacking side wins;
- attacking is an excellent incentive.

Mastering previously unknown possibilities stimulates the young chess players. They can apply what has just been learned directly in their games.

Basic techniques such as the double attack, the pin and eliminating the defence form the building blocks for combinations. That's why we need to offer these techniques in as structured a way as possible. A good understanding, linked to a well-practised skill, is the basis for future success with more difficult parts.

Is it wise to start with Step 2?

Some children and their parents do want that, and the tasks in Step 2 will also work partially well. Why is there a 'negative' recommendation? We give chess lessons to learn to play chess better, not to be able to solve tasks. That is a tool that we need, but not the goal. As long as the students are giving away a lot of pieces in their games, it is advisable to make a halt. Unfortunately, children sometimes start with Step 2 because 'they can already play chess'. That almost always means: they know the rules of the game, but their understanding is far behind children who have been busy in Step 1 for about a year. They can often still benefit from material from the first Step. In particular, the Step 1 plus workbook gives many children who have started with Step 2 (but are not yet ready for it) more than enough of a challenge.

The importance of the extra and plus books should not be underestimated. A mail from a chess trainer stressed its importance: "For all my students, I have come to the conclusion that the additional training from Step 1 extra and plus, is necessary

to improve quickly in playing strength. Even when they are already on Step 3 in the club. After 12 mix-sheets in Step 1 extra they suddenly no longer give pieces away. They win tournaments with ease, while four months earlier they ended somewhere in the middle.”

The early years of the student’s career also play a major role. A few points to consider:

How often does a child play? Only at the club or during the chess lessons at school or more days a week, against friends or on the computer.

Instruction or no instruction? Working only in the workbook? Plus and extra skipped? There are many possibilities and each of them has an influence on the skills. Is chess still an action game, or is it already a bit of a mind game? Do children think things over a little rather than try to play the next move as quickly as possible?

Keeping children at the club

Step 1 paid ample attention to the child’s chess development. We repeat the first paragraph: *“The game of chess has an enormous attraction to children. The shape and different moves of the chess pieces fascinate them. Chess is a game in which you can be the boss, and where you face the consequences of your own actions. Good or bad luck, such as you experience in games like ‘Bingo’ or ‘Monopoly’, does not exist in chess. In short, children think it is a nice – even cool – game.”*

Is that attraction for chess still there at the beginning of the second Step? Usually yes, although there are (too many?) children who have already given up chess. This is partly inevitable, not everyone has to like chess. On the other hand, chess is a fantastic hobby for millions of people around the world. Definitely, it would be nice if more children continued to play chess.

Why does one club succeed better than another in keeping the students of the first Step year after year? The decisive factor is the number of volunteers willing to work with young people. The youth leader with his team cannot be praised enough, especially if their work results in a youth club where a good atmosphere prevails.

The chapter ‘*Running groups*’ from Manual Step 1 explains several things in more detail. In short, the conclusion was: *A peaceful and orderly atmosphere is important, though peaceful must not mean boring. Children who leave a club frequently offer as an excuse: “It wasn’t a pleasant group”, but not “I don’t like playing chess”.*

How to learn to play chess better

The children come to the club to play chess and, above all, to learn to play chess better. We achieve that by giving chess lessons. What that means is not self-evident for everyone.

Learning to play chess better is a total package of:

- **Instruction**
The teacher gives the lesson or part of the lesson from the manual. We cannot explain everything, but we teach it in such a way that the students can discover a lot themselves.
- **Practice**
The students solve the tasks that belong to the lesson. This involves more than just distributing the workbooks. Help, provide feedback while they are doing the tasks, and don't forget to do so after reviewing the tasks. This must not be limited to right or wrong. Depending on the result, the right feedback is essential here too.
- **Playing games**
The students play games (game fragments, mini-games). During the instruction in a simultaneous against the trainer or one another, after the instruction almost exclusively against each other in a competition.
- **Discussing the games**
This part is new in the current Step. In Step 1, the discussion of games is not prominent. It is limited to offering guidance during, among other things, a simultaneous display. We let the students discover that what they have learned can be used in their games. This makes playing more fun and increases the motivation to learn more new 'weapons'.

In short: there is much more than just the workbooks. This has been said since the first publications in Dutch in 1987.

The manual defines the main direction, but the results of the tasks and the content of the games determine the speed (we can continue, repetition is necessary or simply stop teaching new material and just let the students play). It is different from the situation at schools, where the annual programme has to be completed at all costs. If the necessary prior knowledge is insufficiently controlled, then as a result the student continues to suffer.

It is impossible to compare the results of working in a workbook and the quality of the games involved. The score obtained in the workbooks misleads many teachers. For them, the workbooks and exams determine whether the next Step can be started. That doesn't seem right.

AIM OF THE LESSON

- finding mate quickly

PRIOR KNOWLEDGE

- mate
- attacking techniques

ACQUISITION**Concepts**

mating pattern, flight square

Instruction

The following elements are of importance when teaching about mate in two:

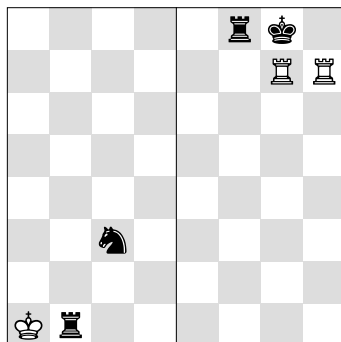
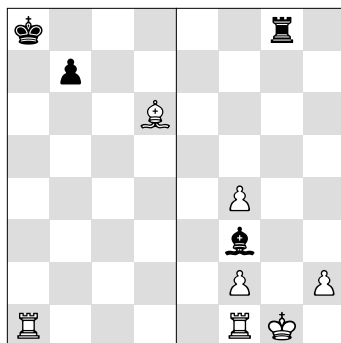
- recognition of a mating pattern (the end position with mate)
- cooperation of the pieces (with supported or assisted mate)

Mating patterns

First, we will practise recognising mate, a skill which also played an important role in the mate-in-one exercises.

The positions in the diagrams ($\Rightarrow$) and ($\Downarrow$) can serve to recall some relevant knowledge. We have to place the piece, which gives mate. This chaser (a term we already used in step 1) can perform several other tasks besides giving mate: it can take away flight squares and protect its fellow pieces (and it can perform the function of a guard as well). The guard keeps the flight squares under control, but at the same time it can protect the chaser.

The students should make up the exercises on their own board.



We will only turn to positions with mate in two when these mate-in-one exercises do not cause any problems any more.

Cooperation of pieces

In most cases, the cooperation between the pieces will consist of alternately chasing and guarding. The point is to limit the freedom of the opposing king. On the left in the diagram (♠), the rook gives check first: **1. ... Rb8+ 2. Ka1 Bc3#**.

On the right, the roles have been reversed: **1. Bf6+ Kg8 2. Rg1#**. The loser has no choice, so the effect of the moves is easy to foresee.

The first condition for giving mate is being able to get at the black king. Giving check has to be possible. Second is the cooperation between the pieces. They have to divide the tasks between them. One piece chases the king to a square so that another piece can intervene. The tasks of the guards weigh heavier in the diagram (⇔). On the left, the knight protects the rook after **1. Nc6+ Ka8 2. Rb8#** and takes away the square a7 from the king: a combination of supported and assisted mate.

On the right, there is a similar picture after **1. Bg3+ 2. Kf1 Re1#**. Note that the rook is also taking care of the g1-square.

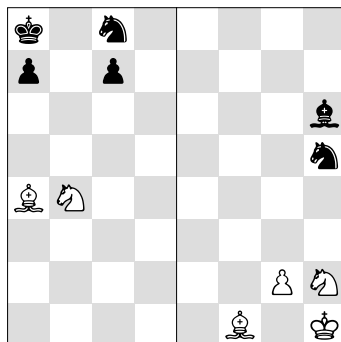
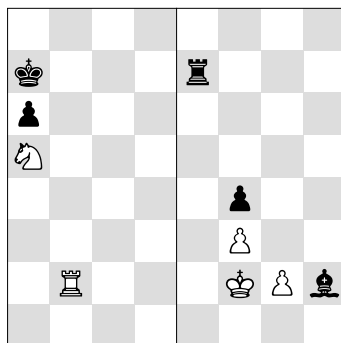
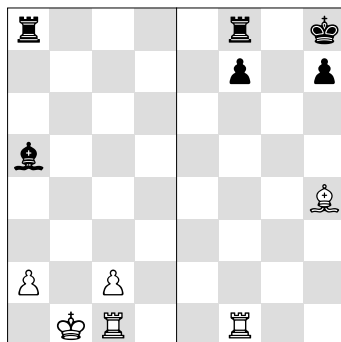
Cooperation entails:

- supporting one another;
- controlling together the flight squares of the enemy king.

When giving mate with two pieces, the 'help' of opposing pieces, which get in the way of their own king, is almost always required. In the following example (♣), in both parts the bishop and the knight work together.

On the left, White plays **1. Bc6+** in order to give mate after **1. ... Kb8 2. Na6#**.

On the right, the roles have been reversed. Now



the knight has to give check first; it is only after that the bishop takes action: **1. ... Ng3+ 2. Kg1 Be3#**.

Twofold attack

Pieces can also help each other in another way: by sacrificing themselves! On the left in the diagram (♠), we find an easy example. Black's vulnerable back rank is an open invitation to a mate with **1. Rc8+ Nxc8 2. Rxc8#**. White gives mate because of the twofold attack on c8. The situation is hardly more difficult on the right. The bishop on g3 is protecting h2. Black has three attacking pieces and that is sufficient to take out the king and the bishop: **1. ... Rxb2+ 2. Bxb2 Rxb2#**.

The twofold attack is more difficult when the mating pattern is more unusual. On the left in the diagram (⇒), White gives mate with **1. Qb5+ Bxb5 2. cxb5#**. Not difficult, but the students need to have seen this type a couple of times before. Giving up your queen just like that is not the first thing they will look for.

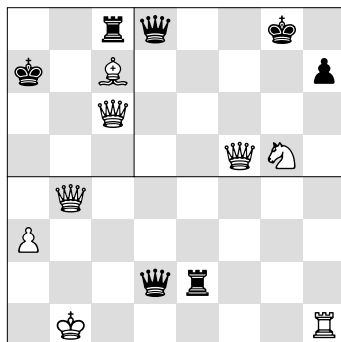
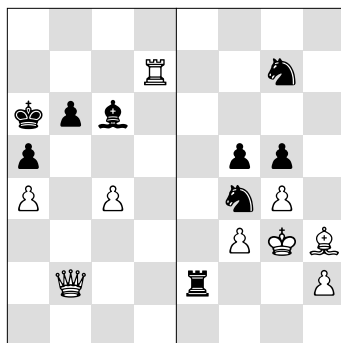
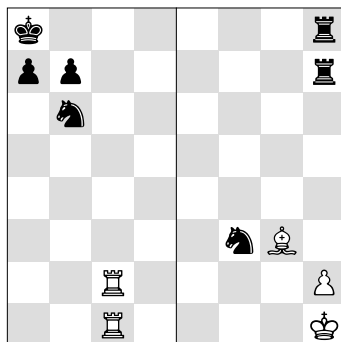
The attacker also has a reserve player on standby in the position on the right: **1. ... Nfh5+ 2. gxh5 Nxh5#** (but not **2. ... f4+ 3. Kg4**).

The B-exercise sheet with this lesson is full of mate-in-two exercises utilising the twofold attack.

In the diagram (♣), there are three positions in which one piece retains the role of the chaser. They are very common and worth remembering. On the left, White gives mate with **1. Qb6+ Ka8 2. Qa6#**.

On the right, Black is lost after **1. Qxh7+ Kf8 2. Qf7#** or **1.Qf7+ Kh8 2. Qxh7#**.

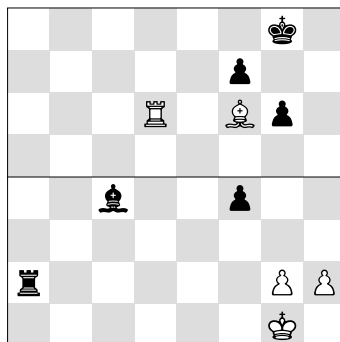
In the bottom half, Black can also give mate in two ways: **1. ... Qa2+ 2. Kc1 Qc2#** or **1. ... Qc2+ 2. Ka1 Qa2#**.



The queen especially is a very suitable piece to place the king in a worse position by giving check and then delivering mate.

The rook can also do the job alone. In the top half of the diagram (♠), Black is mated after **1. Rd8+ Kh7 2. Rh8#**.

A well-known mating pattern comes into existence in the bottom part after **1. ... Ra1+ 2. Kf2 Rf1#**.



The examples given are sufficient for a first lesson. The students will have to gain more skill in giving mate on their own by practising. Important points are:

- coming closer to the enemy king;
- the cooperation (supporting and assisting or a combination of both);
- recognising typical mating patterns (in which the colour and place do not really matter).

PRACTICE

Workbook

□ *Mate / Composing mate: A*



Explanation: The two pieces next to the board have to be positioned in such a way that the opponent is mated. The first letter of the piece will suffice.

There will be considerable differences between the students. With such an exercise, the spatial aspect plays a huge role. Not all students are as advanced in this area. In particular, the positions where the king is in the middle of the board are difficult for them.

Mistake: The solution is wrong.

Help: Have the students indicate which flight squares are still available to the king. In principle, it is the main piece which has to take away the most squares. The lower value piece mostly has a protective function or will take care of giving check

Mistake: The position is too difficult. The way pieces exert influence on

space is difficult to see. It's possible that a student who usually makes few mistakes in his exercises now has many.

Help: We will simplify the exercises by:

- a hint (the knight gives check; the bishop has to protect, it is supported mate);
- showing a similar mating pattern;
- telling where one of the pieces should be.

□ *Mate / Mate in two: A* 

Explanation: Have them indicate both moves until it is mate. Young children who are still drawing arrows can number these with 1 and 2. In all positions, one piece will give check first, after which another piece gives mate.

Mistake: The solution is not found.

Help: Explain which mating pattern appears on the board (i.e. rook and bishop). Should this hint be insufficient, show a similar mating pattern on another part of the board.

□ *Mate / Mate in two: B* 

Explanation: In all positions, the side to move can give mate by initiating a twofold attack.

Mistake: The answer is wrong.

Help: Probably not very necessary. Remove an attacker and defender if necessary, so a mate-in-one position remains.

□ *Mate / Mate in two: C*  

Explanation: The chase on the king (check) and the final blow (mate) is carried out by the same piece.

Mistake: The solution is not found.

Help: Which piece can give check? Where can the king still go?

□ *Mate / Mate in two: D*   

Explanation: See the A-sheet.

ANSWERS

□ *Mate / Composing mate: A*

1) ♖b7, ♘c6

2) ♖a7, ♘a3

3) ♖a4, ♘b3

4) ♜g1, ♞f3

5) ♜a5, ♞d7

6) ♜b5, ♞c3

Additional workbooks

The development of the Step method began in 1985. In 1987, the manual and the worksheets for the first step were published (only in Dutch). Steps 1 to 5 (the basic section) were finished in 1990.

The number of exercises was quite unusual for that time and met with enthusiasm and acclaim, but there was also doubt. Have the children to solve so many exercises? Time has shown that this question has a positive answer. The chess world agreed. Indeed, after some 15 years, the demand came for ‘more’.

This resulted initially in two new additions, the workbooks Extra and Plus. More or less simultaneously came the desire for exercises for young children around the age of six. The Stepping Stones appeared. Later, the workbooks Thinking ahead and Mix were added.

Thanks to these additional workbooks, students can continue practising at more or less the same level and thus spend longer going through a Step. The level of difficulty increases slightly, so that the exercises continue to be challenging.

More training material, has several advantages.

Slowing down leads to a better grasp of the subject matter

Many students immediately take on the next Step as soon as they have completed the current one. Their playing strength usually does not keep pace, they apply what they have learned insufficiently well in their games. The students would have to play more. Thanks to the additional workbooks, students at almost the same level can practice more, and so they can do more and spend longer on a Step. Exploring a theme in greater depth has its advantages. Among other things, it helps you find your way in games more quickly.

It is important that the degree of difficulty does not mount up too soon. The short-coming of (too) quickly proceeding to the next Step can be somewhat countered this way.

Students can work at their own level

The ability to differentiate is greatly expanded. This applies to both weaker students, who can do extra practice on the same topic, and stronger students, who can do more challenging exercises.

Revision and consolidation

If we do not repeat what we have learnt, we will forget it. This was the text in the previous edition, but revision is more accurate; it requires active thinking.

Revision is always necessary, but preferably not with the same positions, because you have to think when solving, not recall the solution from memory. Then you won't learn much. You need to learn tools and concepts because they're widely applicable.

In the Steps method you train a skill in solving positions with general characteristics. You can apply these to your games even if you are not familiar with the position. We try to train problem solvers who are no longer dependent on specific examples.

When solving exercises, the students should look at the positions in a correct way. The more that happens, the greater the chance that they will do so in their games.

Many books and websites emphasise learning patterns and want the learner to become familiar with as many positions as possible. The patterns that really matter – and which must be fully automated and trained – are those that involve playing safe moves without error (see also 'Board vision' on page 11). These are important not only at this level, but also in the higher steps, when the lines are longer and one needs to visualise a position correctly after two or more moves. Working memory should therefore not be required to determine whether a move is safe or not.

At the start of the century, De la Maza promoted 'The Seven Circles'. This is a method where you solve a large number of puzzles multiple times, building instant recognition by decreasing the time limit in each pass while repeating the cycle. The target group consisted of beginners and less experienced chess players. Finnish grandmaster GM Tikkanen developed the Woodpecker method for more advanced players. Information can be found on the internet.

Both methods involve completing a spaced cycle seven times, with each cycle being completed at an increasingly fast pace. Not just once, but seven times! Another similarity is that the same exercises must always be solved. Of course this will improve a chess player's game, but he or she will continue to miss combinations in games.

The number of possible positions is enormous; you can't possibly memorise them all. The diligent student will discover patterns over time. Common sense says that it makes more sense to adopt the recommended search strategy (see the lessons). We should not memorise too much knowledge if there is a more efficient way of getting more out of it. We need to store essential knowledge. This is necessary to be able to think about complex problems and come up with new solutions on our own. Learning new things demands mental effort, and mere repetition is not suitable for this.

When should we start using the supplementary workbooks?

When can we implement these workbooks? It is not possible to give a general recommendation. However, the Step 2 extra workbook can be used alongside the basic Step 2 workbook. It is up to the trainer to decide whether to discuss parts of the Plus workbook and the Thinking Ahead workbook in between. This obviously depends on the group's level, but it is easy to imagine a theme from one of these books arising during simultaneous play.

Trainers who have a good understanding of the entire Step 2 programme can combine things.

Step 2 extra

The majority of the book consists of exercises that cover the topics dealt with in the 'Step 2' basic workbook. These exercises are useful for additional practice and revision.

The exercises on the last ten pages are all mixed up, so there is no indication of the theme of each one. Refer to the instructions in the reminders on the website on how to solve these kinds of exercises (stappenmethode.nl/en/download.php). As well as the one from Step 2 extra, the one from the Step 2 mix is also useful. Mixed exercises most closely resemble an actual game, which makes them a great way to train.

The mixed tasks are difficult for almost all children because extracting the relevant information from a position is far from simple for a Step 2 child. With this kind of exercise, children need encouragement at the beginning to keep trying. It is important that the coach addresses these exercises at the right time.

Making mistakes is not too bad, but the level of difficulty should remain manageable. By solving these challenging tasks properly, children develop a sense of competence ("I can do it!"). Self-confidence grows too, and motivation is guaranteed for a while. This leads to better performance.

The answers can be found on the website at:
<http://www.stappenmethode.nl/en/solutions.php>

Step 2 plus

The classification of the material in the early years of the method (1987 – this only applies to the Dutch version) was adequate. However, many years of experience have shown that some essential aspects were not discussed sufficiently. This was an important motive for the Plus Series.

These books cover:

- new themes;
- themes that did not receive enough attention in the basic Step – partly, of course, due to lack of space;
- in-depth treatment of important themes;
- themes from a previous Step at a higher level of difficulty;
- exercises to improve skills, e.g. the board vision.

All the themes are covered in 10 Plus lessons. Many of these can be short. The main point is that students are able to solve the exercises correctly. We advise against skipping the instructions.

Step 2 thinking ahead

Dear me! Thinking ahead, is that not too much for a chess player who is just starting to learn the game? No, certainly not. The fact that many trainers haven't mastered this skill well enough themselves is not a convincing argument for not paying attention to thinking ahead. It's amazing how quickly students progress in this area after a hesitant start.

There is a wide variety of exercises in the Workbook Step 2 Thinking Ahead. Some of these exercises were used by Rob Brunia as early as the 1980s, even before the Steps method existed. It was only in 2004 that Rob returned to the idea of doing more with these and other skills. Sadly, he passed away shortly afterwards. The idea remained dormant until, thanks to the inspiring efforts of Boris Friesen, it was realised. He was the trainer who guided the first five steps of Benjamin Bok and Max Warmerdam, who went on to become grandmasters.

The rest of this manual contains lessons and instructions for the Step 2 Plus and Step 2 Thinking Ahead workbooks.

Thinking ahead

The Step 2 Thinking Ahead workbook differs from the others. The same is true for the trainer. The approach and types of exercises differ significantly from those in the other workbooks. ‘Different’ is also used in the sense of ‘unknown’. Hesitations about using the workbook in training lessons are even greater than with the Extra and Plus books. This is a pity and unnecessary, since trainers who have tried it have found it to be a positive experience. Every trainer pays attention to thinking things out in his or her lessons right from Step 1. In the strictest sense of the term, almost every exercise in one of the workbooks requires the student ‘to think ahead’, even if only a single move is needed. After all, we have to pay attention to what the opponent can do. The students have to check whether the goal of the exercise has been attained: Has Black been mated? Can I capture safely? In a subject like the twofold attack, the situation after the second move must be clear before playing the first move. Do I win points or not? In Step 1 Plus and 2 Plus there are route planners in which it is perhaps not a precondition for solving the exercise but thinking things out is nevertheless a great help. In the ‘Give check’ exercises, it is often helpful to begin with the final move.

What is true for the first Step is all the more so for Step 2 – if you don’t think ahead, then things just don’t work. So, when you get right down to it, there is nothing new under the sun.

Prior knowledge

What do the students need to have mastered to continue their work through the workbook with a good rate of success? In the whole, the following:

- to have good control of the board (overview of the board);
- the naming of squares must be totally internalised;
- they must be at the level of Step 2.

Board vision

A good overview of the board is indispensable for thinking ahead. If you do not see that after the first move or any move played, a piece is hanging, then learning to think things out at a higher level is not a priority. After considering a position for a few seconds, a good chess player immediately sees whether mate is possible or whether a piece is in danger or can be won. He or she can manage that because all the basic patterns (the interplay between the pieces and the spatial effects of their movements) have been stored in long-term memory. So, what is involved is

an automatic process. A beginner at chess has hardly any knowledge to fall back on. A good overview of the board is essential, since the working memory can be used for other purposes.

At the end of Step 2, after the Plus section, the students ought to have a good board vision. Actually, in their games they should no longer be giving away pieces, ‘forgetting’ that they can win a piece or missing mate in one. Should this happen, however, then there is no way the next subject should be started. A basic ability – since at the end of Step 2 a control of the board is just that – which has been insufficiently well mastered, will lead in their games to unnecessary and frustrating mistakes.

Naming squares

A satisfactory mastery of the naming of squares and a lack of problems in writing down moves (without looking at the coordinates around the board) are prerequisites. In the first Step we do not as yet require the students to write down the answers to the exercises or to note down their games. On the other hand, in the Step 1 handbook one finds: “In teaching it is extremely practical if the students can name the moves.” At best, there should be no fuss and the students can use arrows until the time they have been urged to write down the moves. At the start, using arrows makes sense because that is an extra sense organ (touch) sending information to the brain. As soon as the moves of the pieces have become automatic, this advantage can be neglected, and the time has come to (gradually) have them write down their solutions.

Knowing the names of the squares is essential for the blind exercises, since the positions are all shown in the following way: ♔f1 ♚b3 ♜e7.

When thinking things out, it is also important for variations to be mentioned quite specifically, whether the variations are written down in the form of notation or given orally. For some children who have a strong visual memory, this presents problems at the start. Specifically, these children will benefit enormously if they can convert an oral description into a position. It should no longer be the case that the children think: “Then I do this, and he does that, and then I can take it.” It is not relevant whether this is with the help of a finger or not. If things are expressed as notation (e.g. Bxh7+) it is much easier to visualise the moves.

Level Step 2

This is a very imprecise description. Is the possession of the Step 2 certificate automatically the correct level?

There is (unfortunately/fortunately) no clear answer. The concept of ‘playing strength’ is the sum of many factors. Knowledge is certainly not the most important

The Steps

Books

The following books are available in the Steps Method series:



Manuals for chess trainers:	Step 1, Step 2, Step 3, Step 4, Step 5
Manual for independent learners:	Step 6
Basic workbooks:	Stepping stones 1, Stepping stones 2, Step 1, Step 2, Step 3, Step 4, Step 5, Step 6
Extra workbooks:	Step 1 extra, Step 2 extra, Step 3 extra, Step 4 extra, Step 5 extra, Step 6 extra
Plus workbooks:	Step 1 plus, Step 2 plus, Step 3 plus, Step 4 plus, Step 5 plus
Mix workbooks:	Step 1 mix, Step 2 mix, Step 3 mix, Step 4 mix, Step 5 mix
Thinking ahead workbooks:	Step 2 thinking ahead, Step 3 thinking ahead

Updated information can be found at our website:
www.stappenmethode.nl (EN, FR, DE, NL)

Sales of the English version are handled by Chess-Steps:
chess-steps.com/

Software

The Chess Tutor for Windows is a series of chess learning software based on the 'Steps Method'.



Chess Tutor Step 1, Chess Tutor Step 2 and Chess Tutor Step 3 are available as download or as CD.

The Chess Tutor free demo version is the best way to try it out.

More information at: <http://www.chesstutor.eu/en>