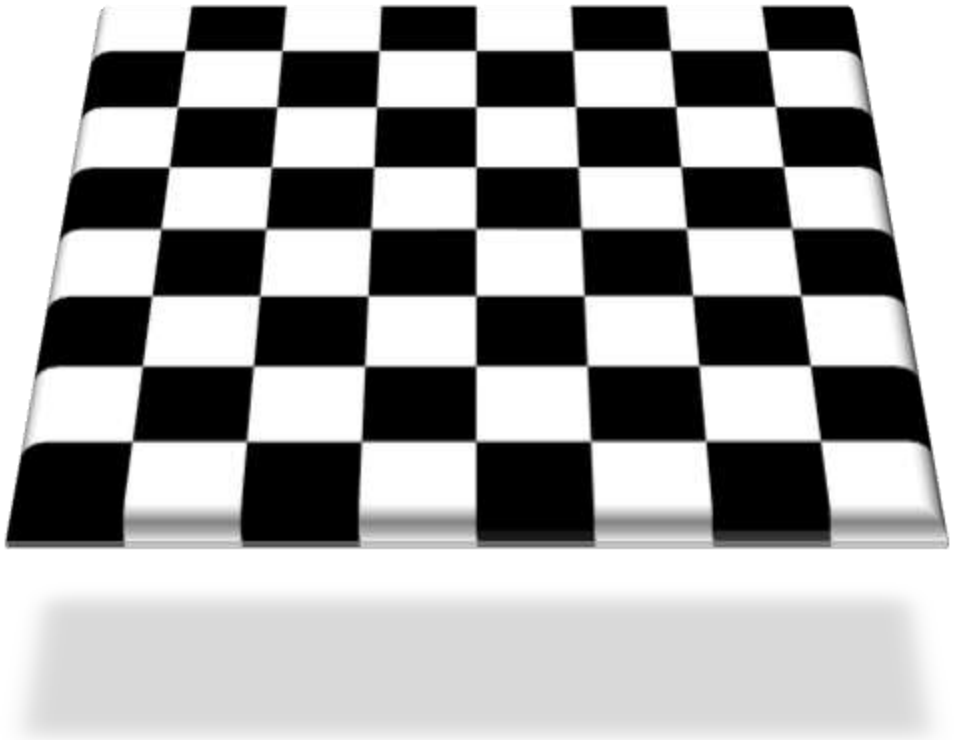
CHESS TEAM

MANUAL OF FUNDAMENTAL CHESS SKILLS



7TH REVISED DRAFT
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Introduction

Welcome to the wonderful world of chess. This manual is designed for both beginners and intermediate players. With this manual, a true beginner can know nothing about chess and learn everything they need to know to play chess at a high level. The order of lessons and diagrams are structured such that a complete beginner can slowly and methodically learn the game of chess. Lessons are designed to become progressively more intricate yet can still be used individually without reading the rest of the manual. This manual is in no way a substitution for detailed personal study of the game using professionally developed resources.

The manual is not intended to be a sole mentor to a chess learner. Players should read a lesson or two at a time then spend some time using those ideas in practice games. Practicing with an experienced player is the best way to learn the game of chess. Practice in between lessons is paramount to fully learning and understanding each concept as a player develops.

The manual is intended only to introduce concepts to players. Not every intricacy can be explained, therefore, common sense demands that if a player wants to truly grasp the game of chess and develop his or her skill, that player should seek professional products (books, computer programs, coaches, etc.) to learn from. More thoughts on this idea are presented in the final section of the manual

From here, I recommend that intermediate players also begin at the start of the manual because a return to basics is always helpful. All players can always benefit from a relearning of the fundamentals. Also, even in the very early sections, I have included strategic principles crucial to the game. This way, a beginner can have some basic strategy even as he or she develops from scratch. Some intermediate players would benefit from learning these principles because many never got the detailed instruction present here.

On the other hand, each lesson is designed to be a unique package in and of itself. Some players may only want to work on a single aspect of their game; therefore, they only study a single lesson. In other words, each lesson does not need to be read in sequential order.

My hope is that this manual will increase the level of play within the chess team by providing more students with the kind of instruction necessary to building a solid foundation of chess fundamentals. This way, each practice session can be concise and to the point. This will free up instructional personnel to work more efficiently and directly with students learning the game.

I hope that all chess players find a love for the game of chess. Chess is an art form which can only really be discovered once the basics are learned and understood. The most important thing is to find a love for the game and to continue playing chess throughout one's life.

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SECTION 1: BEGINNING WITH BASICS

➔ THE BOARD

- ► This section of the manual is designed to teach players the intricacies of the chess board. The lesson teaches the different layers of the board so that each player can more fully understand why certain areas of the board are more valuable than others.

➔ THE PIECES

- ► This section of the manual is designed to teach players about each piece on the board. With each piece is an explanation of: its motion, its capturing abilities, and a basic introduction to the strategies associated with it. All types of motion are explained including castling, en passant, and promoting.

➔ ENDGAMES

- ► This section of the manual explains how chess games are ended. Some specific endgame types are explained, but after reading this section, any player should understand how to end a chess game.

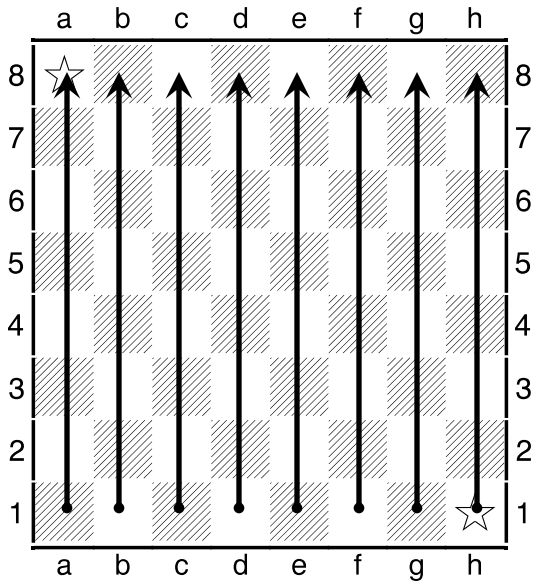
➔ RECORDING GAMES

- ► This section of the manual explains how to read and write chess notation which is an essential element to learning chess and strategy.

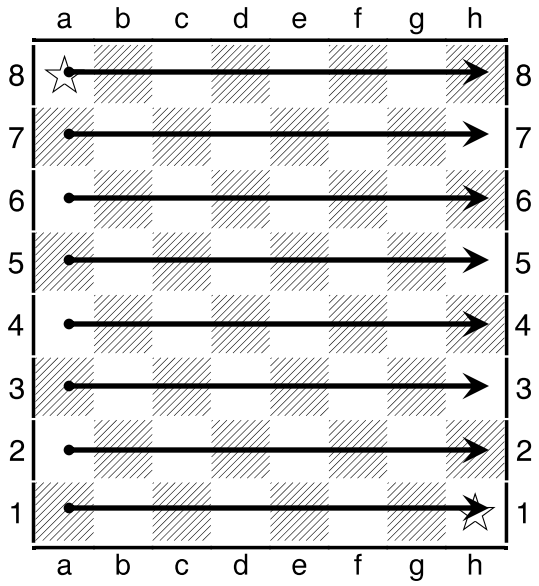
THE BOARD: KNOW YOUR BATTLEFIELD

When most of my students begin to learn chess, the first thing they say is, "I know how to move the pieces." This is a sign of a true beginner. Knowing about the pieces neglects the place where they live and move. The board is deceptively simple. It's 64 squares, 8 x 8, alternating light and dark squares. (By the way, that's how we usually refer to the squares. Sometimes they are black and white, sometimes they are red and white, and sometimes they're just light and dark, like on glass chess sets.) At first glance, there is nothing that looks different at one end of the board to the other. However, if we think about the fact that 32 pieces will live, move, attack, defend, and perish here, the board becomes a battlefield with its own hills, valleys, twists and turns.

To begin, we must learn the layout and terms of the board. Every board is referred to by a file and rank system. A file is a line on the board that runs vertically from you to the other player. Each of the 8 files is named by a lowercase letter (a-h), (a) is the furthest left, and (h) is the furthest right. A rank is a line running right to left. Each rank is numbered (1-8). Ranks may sometimes be referred to by a "player's rank." This means the number of the rank from the player's perspective. For example, White's 3rd rank is rank #3, but black's 3rd rank is rank #6. White's 5th rank is rank #5, whereas black's 5th rank is #4.



Files

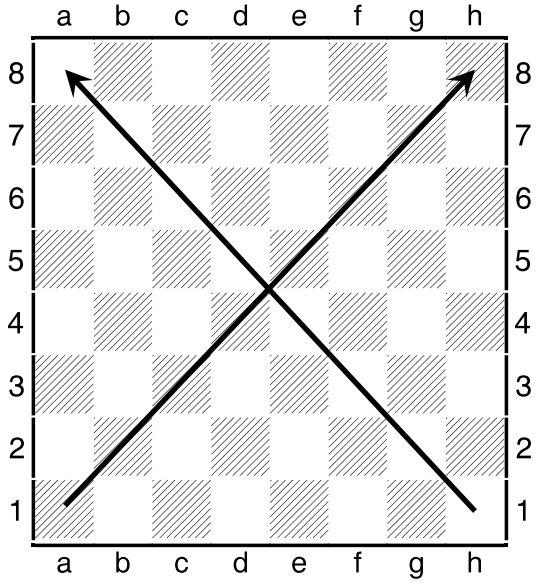


Ranks

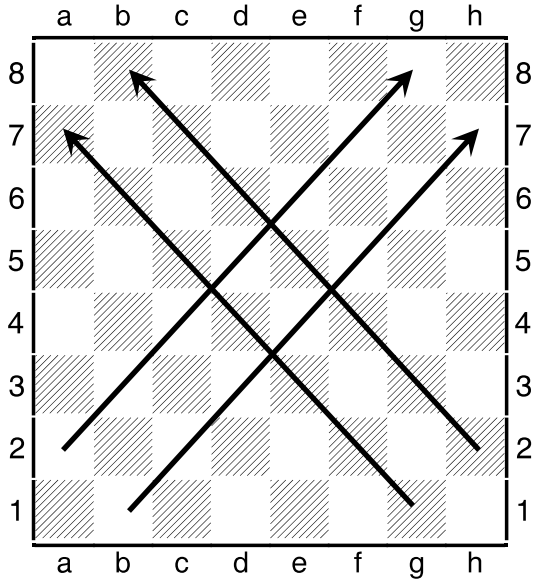
The board is always lettered and numbered from the perspective of the white pieces. This coordinate system allows us to talk about certain locations on the board by naming first the file then the rank. For example, notice squares a8 and h1 (stars above). From either the white or the black side, the board should always be set up with a light square in the near right hand side; this is h1 from white's perspective and a8 from black's perspective. From here on in, we will often refer to pieces and squares by these coordinates.

THE BOARD: KNOW YOUR BATTLEFIELD

We also look at the board in terms of diagonals. These are referred to by their beginning and ending squares. For example, the a1–h8 diagonal is the longest dark square diagonal on the board, and the h1–a8 diagonal is the longest light square diagonal on the board. These are key because of their length. The second longest diagonals actually run perpendicular to the longest. Note the g1–a7 and the h2–b8 diagonals as well as the light squared b1–h7 and a2–g8 diagonals.

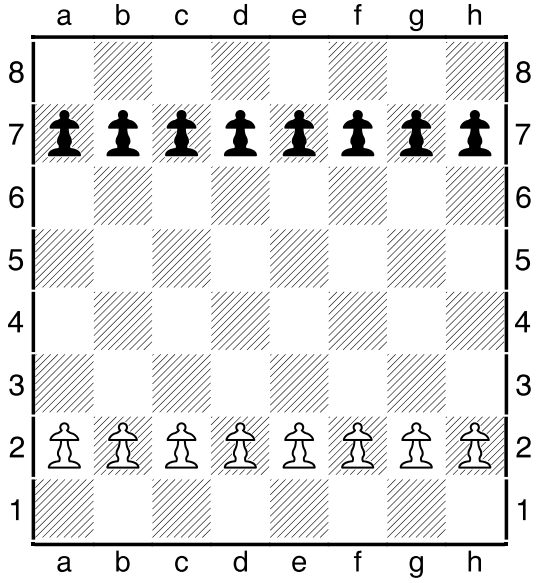


Long Diagonals

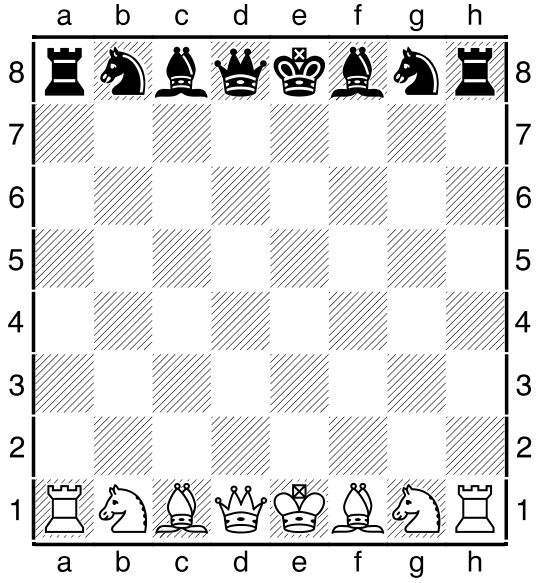


2nd Longest Diagonals

The pieces always start from the same position; Pawns occupy each square in a player's 2nd rank. On each player's back rank, the king and queen start in the center (remember: the queen always has her own color), next to them are the bishops, then the knights, then the rooks.



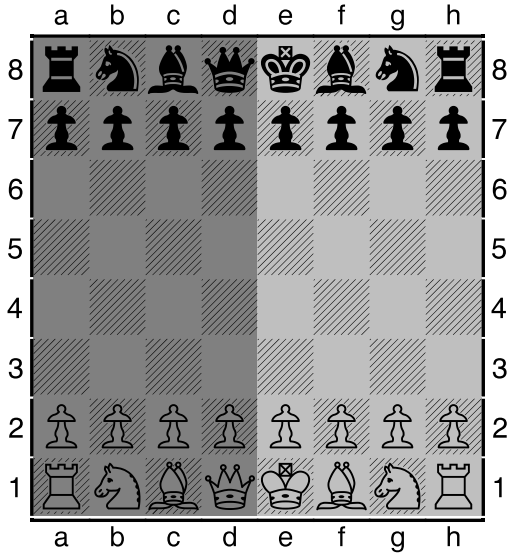
Pawns



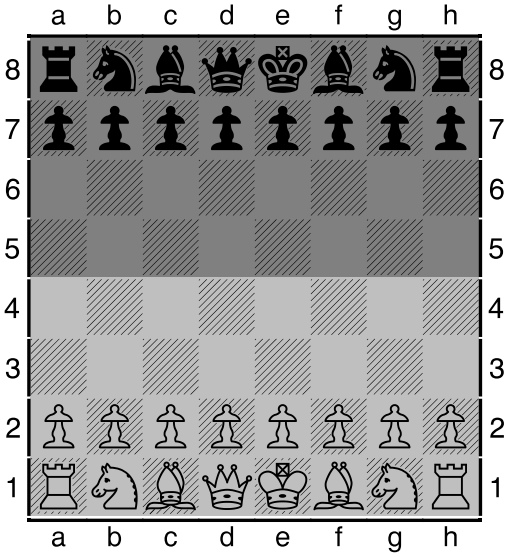
Pieces

THE BOARD: KNOW YOUR BATTLEFIELD

The board is divided into two sides both from a horizontal and a vertical position. First, the board is divided left to right as the queenside and the kingside; so named because that is the starting position of the title pieces. Second, the board is divided into black territory and white territory. These are the four ranks defended by the opponents.

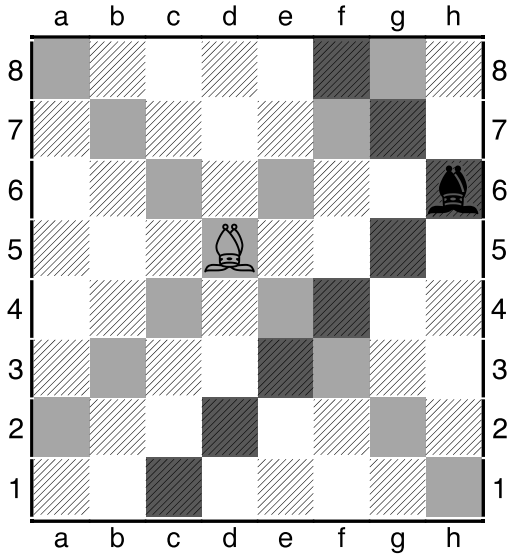


Queenside and Kingside

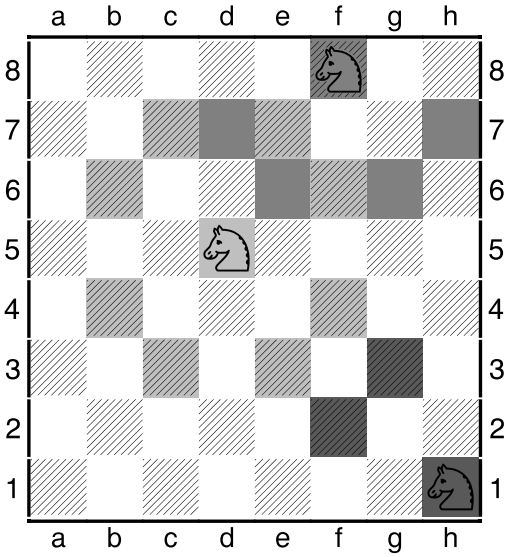


Black and White Territories

It is important to remember how each piece moves and realize its maximum potential. Below, we see the bishops on d5 and h6. The h6-bishop can only move to 7 squares (g7, f8, g5, f4, e3, d2, and c1). However, the d5-bishop can move to 13 squares (c6, b7, a8, e6, f7, g8, e4, f3, g2, h1, c4, b3, and a2). Next, we see three knights at (h1), (f8), and (d5). The h1-knight has only two places to move (f2 and g3). The f8-knight still can only move to four squares (d7, e6, g6, and h7). Hence the expression, "a knight on the rim is grim." Notice the d5-knight, the one in the center, has 8 places to move (b6, c7, e7, f6, f4, e3, c3, and b4).



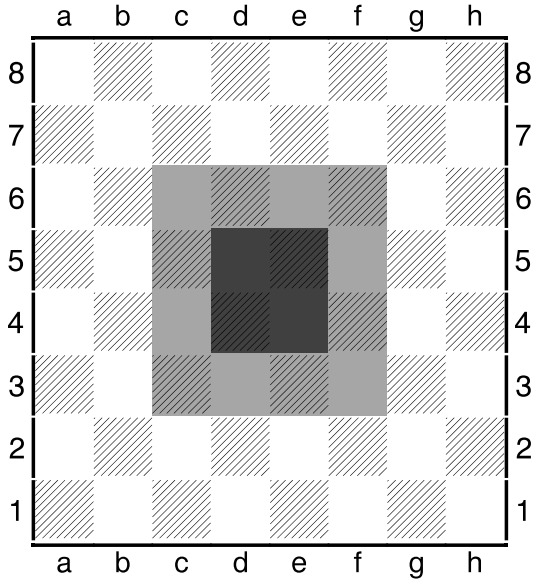
Bishop's Mobility



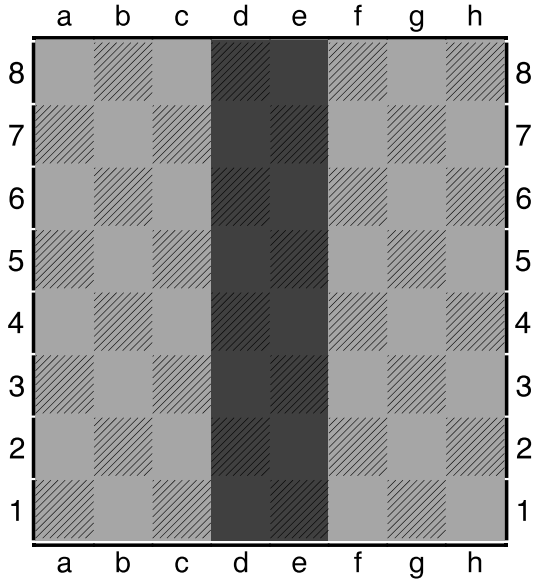
Knight's Mobility

THE BOARD: KNOW YOUR BATTLEFIELD

When we realize that pieces are most effective in the middle, we begin to see the importance of the center four squares (d4, d5, e4, and e5). In fact, most of each game's strategy revolves around placing pieces in the center or controlling the center of the board. This often involves the squares surrounding the center, as well. Most effective openings are aimed at just this concept. This is also why we often try to utilize the center files as effectively as possible with rooks. Our goal is to protect the pieces which are most effectively placed in the center.



Center Squares



Center Files and Flanks

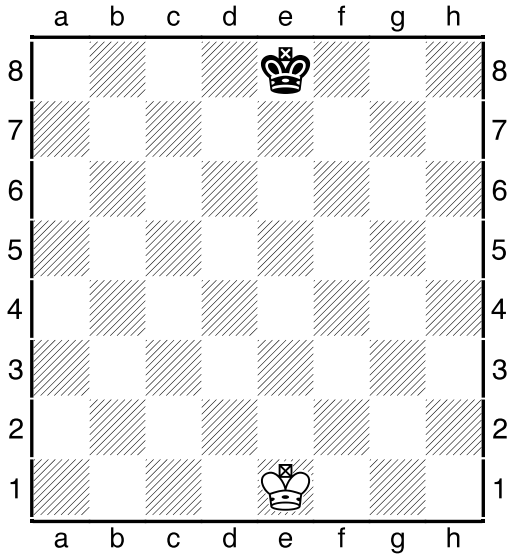
We may also consider our "flanks." These are the sides of the board. We may use the flanks to develop attacks, develop decoys, offer sacrifices, or as a safe location from which to attack or defend the center. Flanks are referred to as either Queenside or Kingside.

Now that you know the ins and outs of the board, you can see that it isn't quite so simple. The board offers many layers of view: 1) files, ranks, and diagonals; 2) queenside and kingside; 3) white and black territories; and 4) central squares and flanks. The Chess Board offers tight corners, vast open plains, and devious hiding places. You must be aware of the environment at all times, always ready for the next attack, and always ready for the opportunity to take advantage of the landscape to mount your own attack. Now, it's time to turn our attention to the armies we will command on this treacherous battlefield.

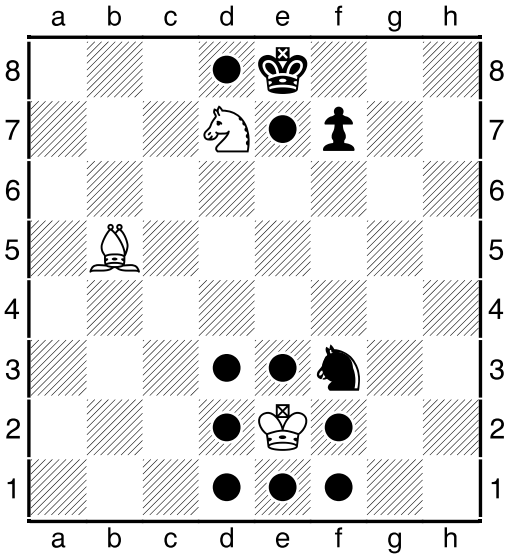
THE PIECES: KNOW YOUR ARMY

The King

To begin, the king is the keystone of the entire game. He resides in the center of his armies beside his Queen. His motion is simple and short. He moves a single space in any direction which is not occupied by one of his own pieces. He captures enemies in his way, unless the enemy is protected.

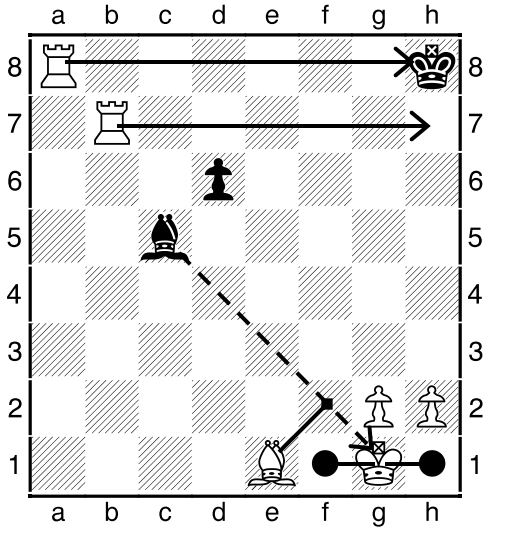


King Starting Position

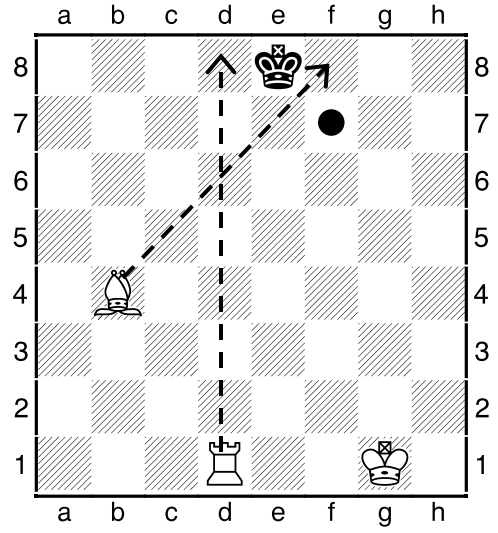


King Mobility

When the king is under attack, and he cannot defend, he is in "Checkmate." Notice in the diagram below, the black king is checkmated by the two white rooks. The white king is only in "Check" because he can either move out of the way to f1 or h1. White can also move the bishop to f2 to both block and attack black's bishop. When we put our opponent in check, it is customary to announce it by saying, "Check." The object of the game is to checkmate your opponent. One final note, a king cannot move into check because he could then immediately be taken. Notice in the final diagram that the black king can only move to f7 due to white's bishop and rook which hold d8,d7,e7, and e8.



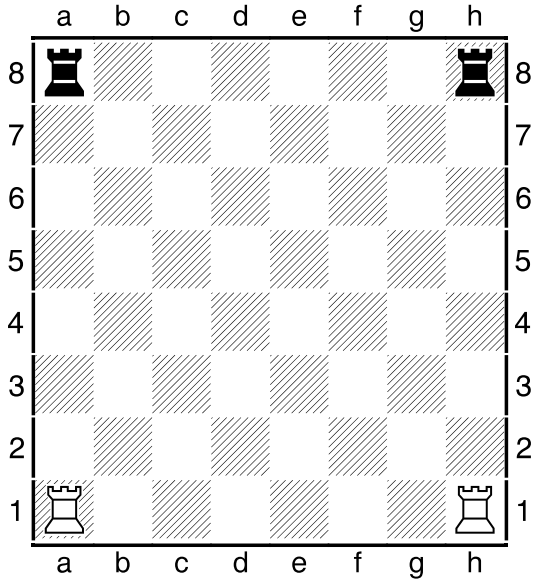
Check and Checkmate



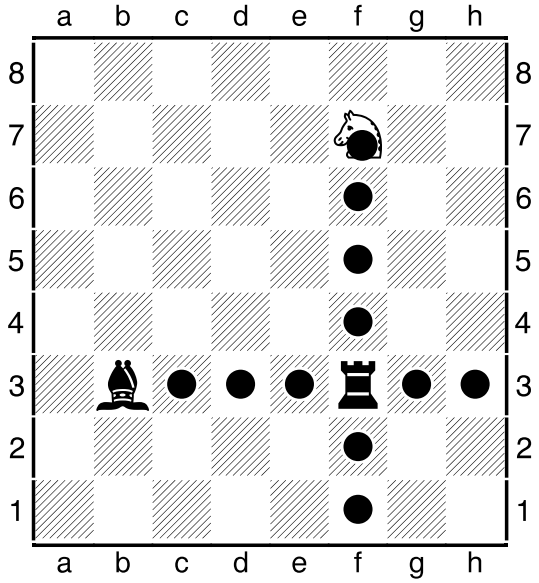
King Mobility 2

Rooks

Next, let's look at the rook which usually resembles a castle's tower and starts at the four corners of the board. Rooks move either vertically along files or horizontally along ranks. It has long range capability (it can move as far as the position allows it) and it can attack multiple squares at once. Rooks capture by moving to an enemy-occupied square.

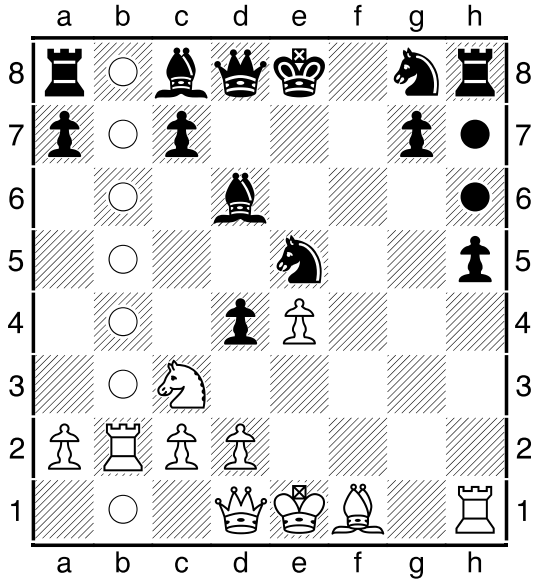


Rook Starting Position



Rook Mobility

Rooks are considered most effective on open files. Consider how many square white's b2-Rook influences versus black's h8-Rook. Notice that the b2-rook is attacking seven squares and the h8-rook is only attacking two. This is because the b2-rook is on an "open-file" (a file with no pawns on it), and the h8-rook is on a "half-open file" (a file with only one pawn on it). Look for ways to maneuver your rooks to these types of files.



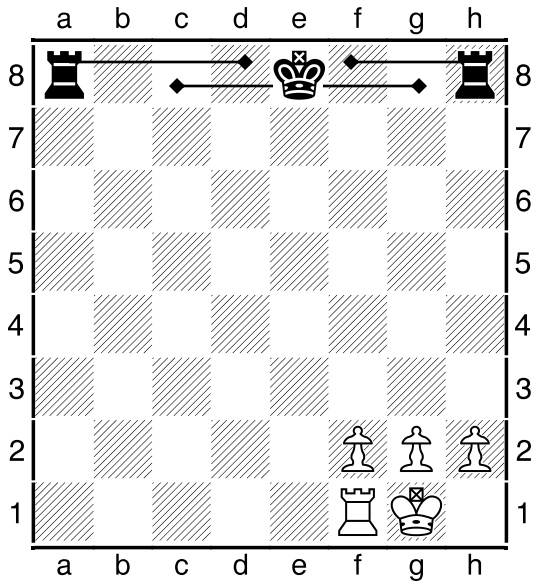
Rook Strategy

Castling

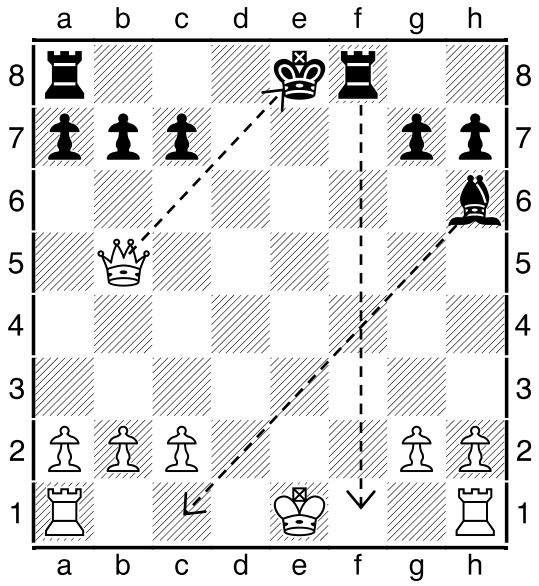
"Castling" is a unique ability of the king and rook relationship. When a king "castles," he moves two spaces towards the rook, and the rook moves into the space which was skipped. In the first diagram, the black king is showing the ability to castle to either kingside or queenside. In the same diagram, the white king has castled to the kingside. Looking at white, you can see how the king is tucked away, safe from attack. It is a good idea to try and do this early in a game to protect your king from quick and direct attacks. However, there are a few rules to this ability:

1. You cannot castle if the king or the rook (the one being castled) has moved.
2. You cannot castle if your king is in check.
3. You cannot castle "through" check.

In the second diagram below, we see that the black king cannot castle to the kingside because the kingside rook has moved. He cannot castle to the queenside either because he is in check from the white queen (at b5). The white king cannot castle kingside because the black rook is attacking square f1. The white king cannot castle queenside either because the black bishop is attacking square c1.



Castling

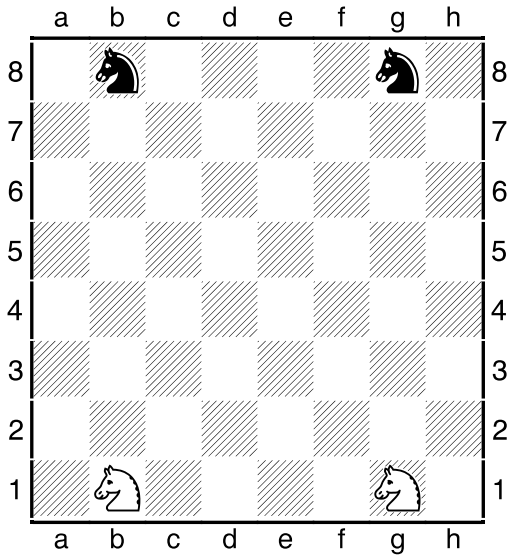


Illegal Castling

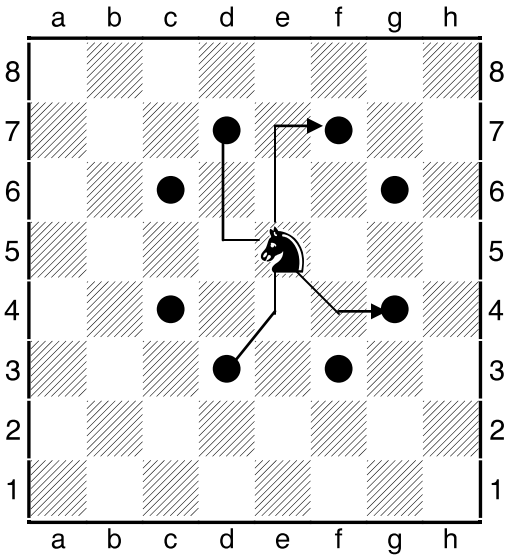
When used early and effectively, the castle is a basic strategic move which protects the king. Generally, castling kingside is stronger because, as in the first diagram above, the king protects all his pawns at f2, g2, and h2. When castling queenside, the white king lands on c1 and would have to move again to protect a pawn at a2.

Knights

Knights, which usually resemble a horse, move in an "L" shape. Think of it as two squares in one direction then one square to the right or left. Some people think of it as one straight and one diagonal (or one diagonal and one straight). Whichever way you think of it, you'll end up with the same results. The knight can also jump over pieces, a special ability awarded only to the knight. The knight, like the rook captures by moving to the enemy-occupied square.

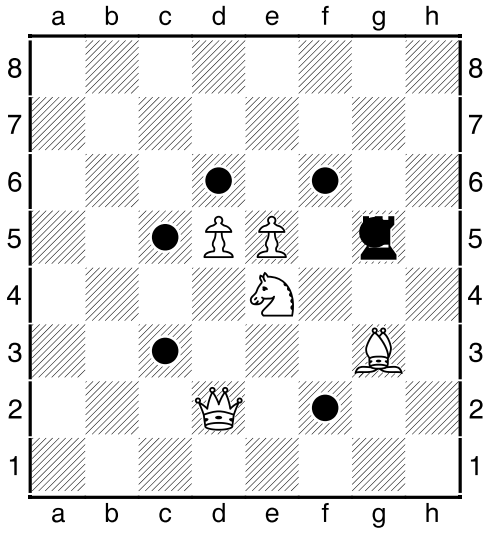


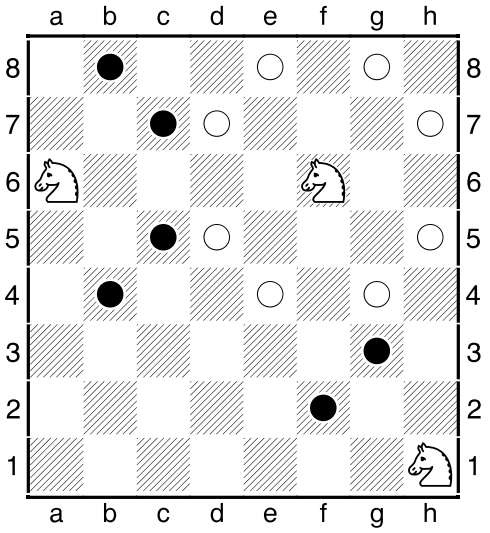
Knight Starting Position



Knight Mobility

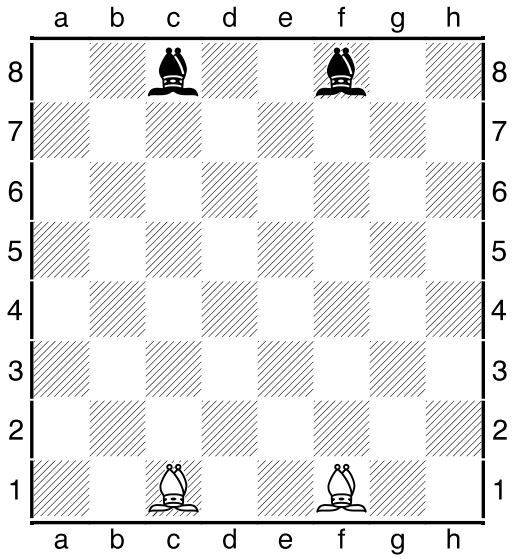
The knight is considered a minor piece because, at any given moment, the knight can only move to a maximum of 8 squares. However, due to its unique jumping ability, it is still an important part of our army. Remember, the knight does its best work closer to the center because, when on the edge, its number of attacking squares is limited. We see below that the a6-knight has only 4 options, the h1-knight is worse with only 2 options, and the f6-knight is best with 8 options. A common expression to remember this rule is: "A knight on the rim is grim."



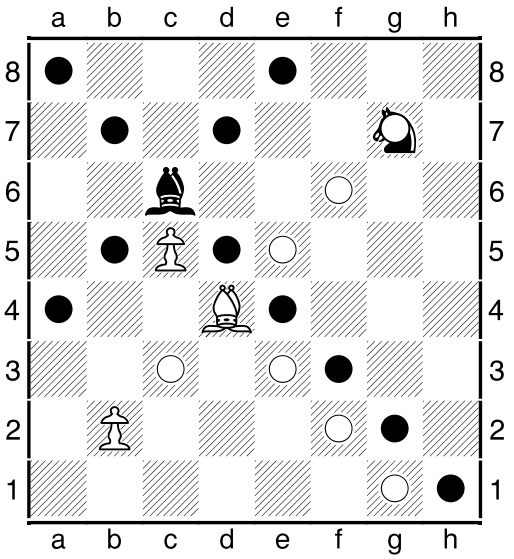


Bishops

Bishops, which usually resemble a Catholic Bishop's hat, move in straight lines along diagonals on the chess set. Bishops, unlike the knight, cannot jump over pieces. They also capture by moving to the opponent-occupied square. Notice that, at the start of a game, each player has a bishop on a light square and a bishop on a dark square. We refer to each as the light-square or the dark-square bishop. This is important because a dark-square bishop can only move to, attack, or defend dark squares on the board. In this way, the bishop is similar to the knight because each bishop is always limited in its movement to half of the squares on the board.

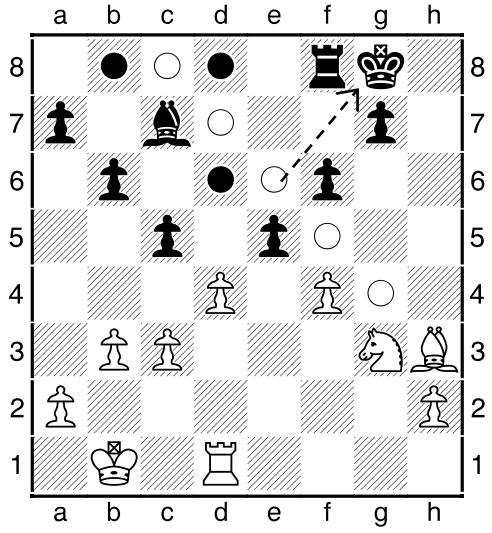


Bishop Starting Position



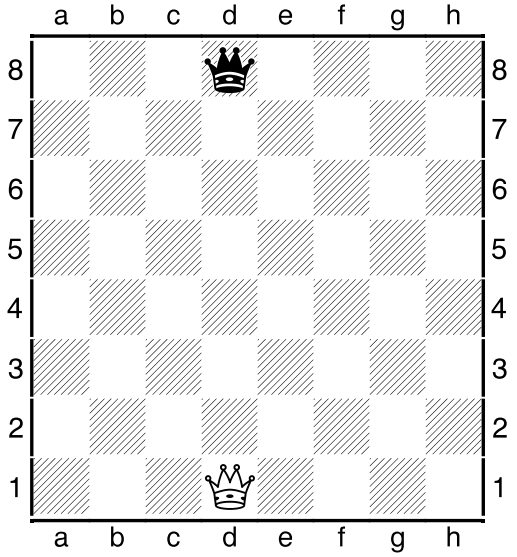
Bishop Mobility

A bishop's strength really relies on the position of pieces on the board. Note below that white's light-square bishop can easily slip behind black's lines to e6 to attack black's king at g8. Also note that black's dark-square bishop is hemmed in by the placement of the pawns. White is said to have a "good bishop," and black's bishop is said to be a "bad bishop."

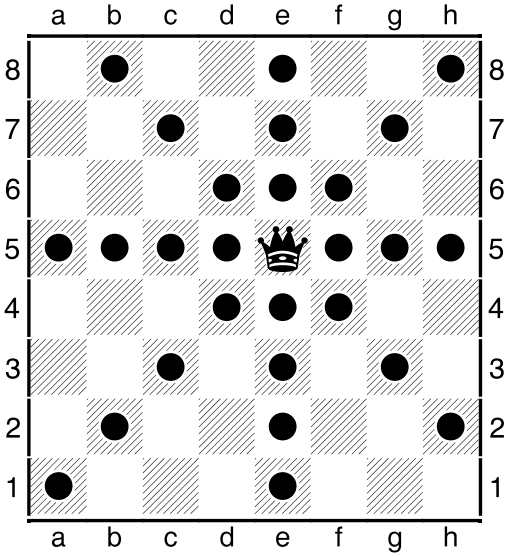


The Queen

Queens always begin in the center square of their own color. Just remember that the Queen always gets her way. The Queen is the most powerful piece on the board because it combines the powers of the Rook and the Bishop. She can move diagonally, horizontally, or vertically. Because of her tremendous power, it would be generally unwise to risk her too early in the game.

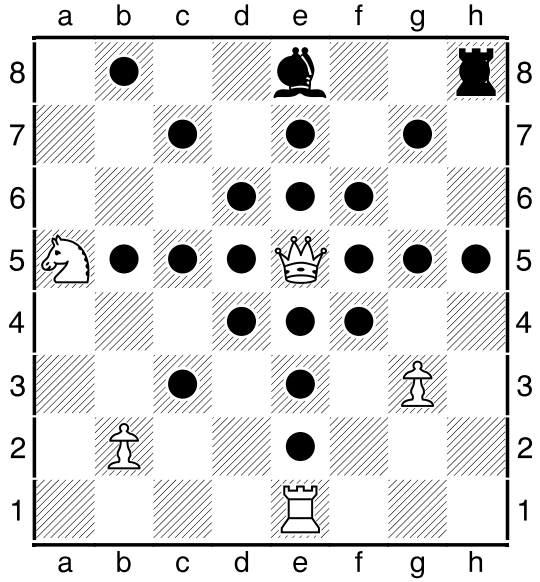


Queen Starting Position



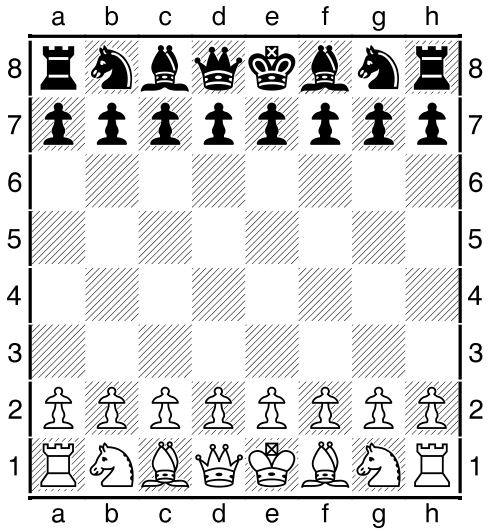
Queen Mobility

The queen cannot jump over pieces, and it captures enemy pieces just as the rook, knight, and bishop capture, by moving to an opponent occupied square. Because of her combined powers, the Queen prefers open files like a rook as well as open diagonals like the bishop. Unlike a bishop, she is not confined to either light or dark squares because of her ability to move like a rook.

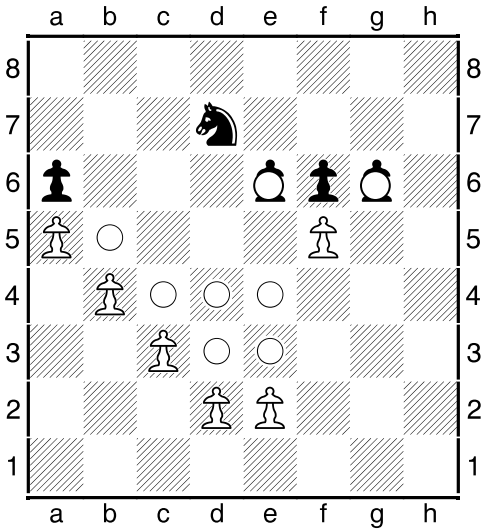


Pawns

Finally, we reach the pawn. Often, the pawn's value is overlooked by newcomers to chess. Each side has eight pawns lined up in front of the other pieces. We just looked at how each piece is affected by the position of other pieces on the board. Pawns are quite effective at being those other pieces. Each pawn can only move forward one square at a time. Pawns cannot move to a side, nor can they move backwards. Unlike the other pieces, pawns do not capture by moving to the square. Pawns capture diagonally. In the diagram below, we see a white pawn on f5 attacking black pawns at g6 and e6. We also notice that the e2-pawn shows an option of moving two squares. Only on their first move, pawns may move forward two squares instead of one (see also: En Passant).

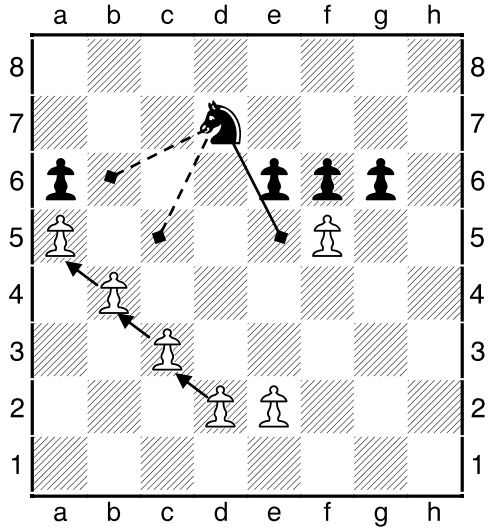


Full Starting Position w/Pawns



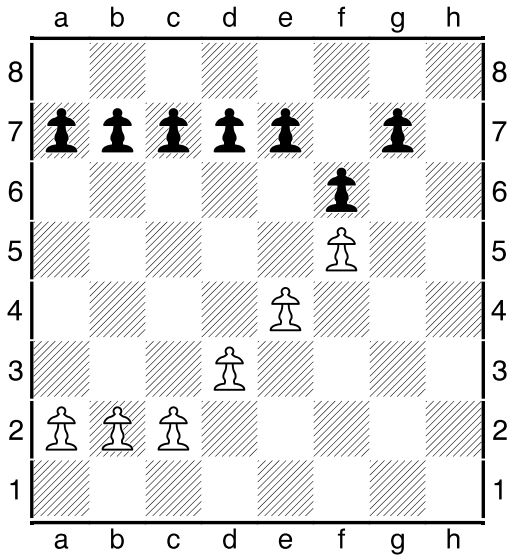
Pawn Mobility

Pawns have a unique ability to protect one another, as in the example below. White pawns at (d2, c3, b4, and a5) are protecting each other in a "pawn chain." This wall makes it undesirable to move the black knight to either c5 or b6. However, because pawns capture diagonally, the black pawn at f6 offers protection for the knight to move to e5.

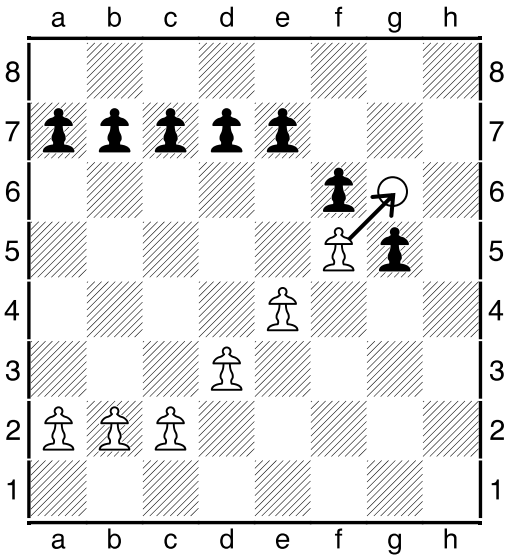


En Passant

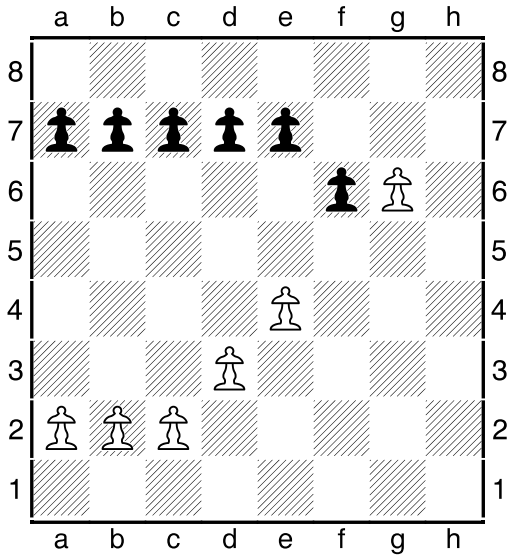
Pawns have another unique ability called "en passant." This is a French phrase meaning, "in passing." We already know that pawns can move forward 2 spaces only on their first move. We also know that pawns capture diagonally. In diagram #1, if any black pawn on the a-, b-, c-, or d-files moves forward two, there is nothing strange. However, if the black pawns on either the e-, or the g-files moves forward two, it ends up next to the white pawn on white's fifth rank. In this case, the white pawn has the option to capture *en passant*. This means it moves to its normal capturing square which is actually behind the black pawn (#2), thereby capturing the passing pawn (#3). Black has the same capability when a black pawn rests on rank 4 (black's fifth rank) as we see in diagram #4. A player can only capture en passant on the first move after the opponent's pawn has moved.



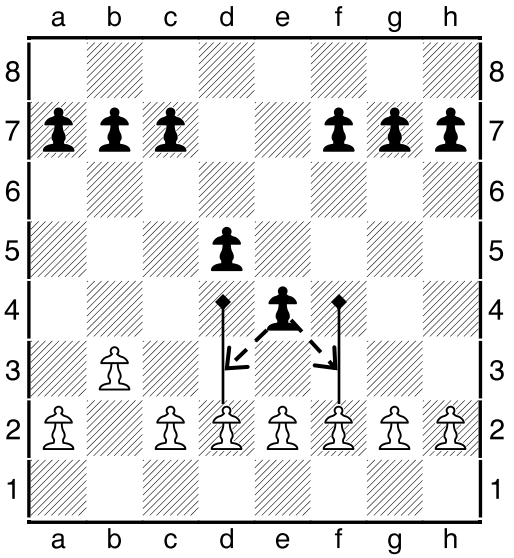
En Passant #1



En Passant #2



En Passant #3

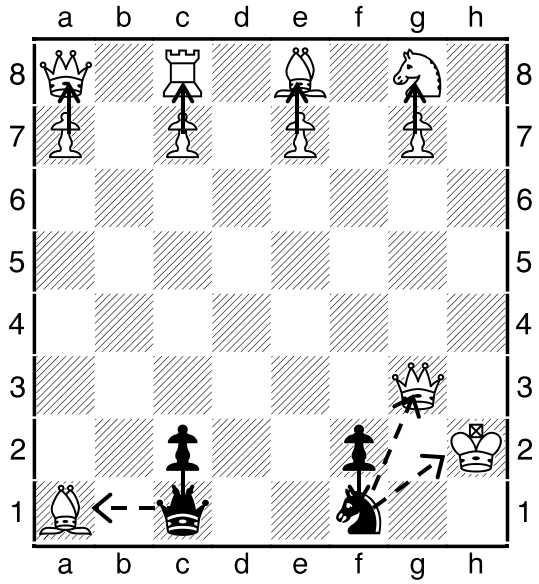


En Passant #4

Promoting Pawns

Pawns have one final ability which makes them quite powerful. Pawns have the ability to be "Promoted" to another piece. When a pawn reaches his eighth rank, he can promote into any other piece accept, obviously, a king. In the diagram, each of the white pawns is showing its ability to promote.

Our first instinct is to promote to our most powerful piece, the queen. Often this is a good choice, as with black's c-pawn. However, depending on the situation, it may be a good idea to promote to something else. Below, black's f-pawn can promote to a knight, thereby attacking both the white king and the white queen. The white king will have to move out of check, and the knight will be left free to capture the white queen. Black will have eliminated white's queen for the low price of a single pawn!



Promoting Pawns

Now you know the battlefield as well as your army. You must be a prudent commander and not waste your men. You must also utilize each piece to its best ability depending on the terrain. Not only do you know the rules of the game, you now possess the basic strategy behind each piece. How you combine those strategies to form iron-clad defenses and cunning attacks is up to you. You have much more to learn about strategy and tactics, but you know everything you need to know in order to wage a successful war. Each war will be unique, offering new challenges and learning experiences to test your mettle.

ENDGAME: CHECK AND CHECKMATE

In order to win a game of chess, we must understand the very basic goal of the game. Our goal is to capture the enemy king. However, the king is never actually captured. The game ends when a king will be captured on the next turn. When the king is under attack but can avoid being captured, he is said to be in Check. It is customary to announce when we put the enemy king in Check by saying, "Check" as we make our move. When we place a king in check, and he cannot escape, we announce "Checkmate," and the game is over.

Check

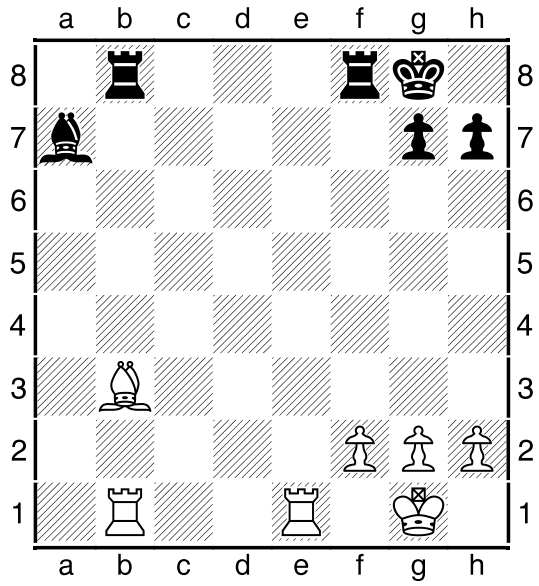
When a king is in check, there are three ways to end the check:

1) block the attack with another piece (interpose a piece),

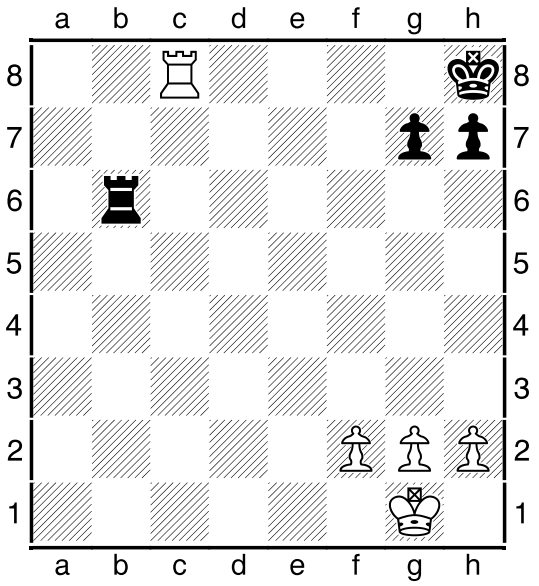
2) move the king out of the way, or

3) capture the attacking piece.

In the diagram below, black could stop check with a block by moving the f8-rook to f7. Black could also stop check by moving the king to h8. Finally, black can stop check by capturing the b3-bishop with his b8-rook. The best way to stop check depends upon the position and the situation.



CHECK



CHECKMATE

Checkmate

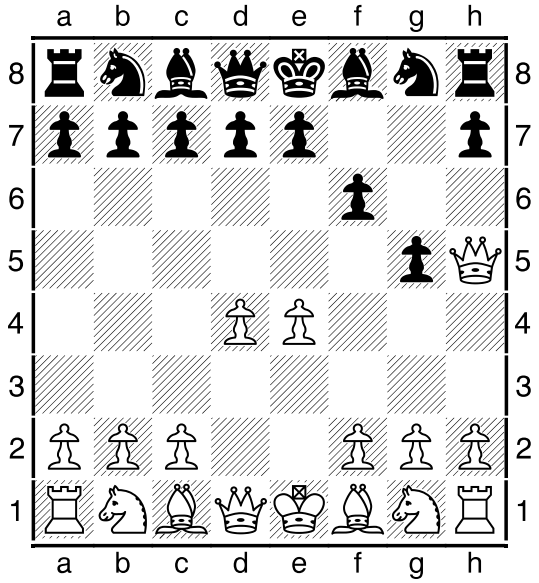
Checkmate is when the king under attack cannot block check, move away from check, or capture the attacking piece. Below we see an example of what is called a "back-rank mate." In the above checkmate, black cannot put any pieces in the way of white's c8-rook. Nor can black move away from the d8-rook's line of attack on the 8th file because of his pawns on g7 and h7. Finally, black has no way of capturing the offending rook. Notice that the white king has no prepared escape, and black was a single move away from checkmating White...

ENDGAME: CHECK AND CHECKMATE

The above example of a back-rank mate is one type of checkmate to look for and defend against. Usually, we do not see games end with this type of mate, but it is commonly used as a threat in order to force our opponent to defend. The examples below are early game checkmates to watch out for. Below each diagram is a possible series of moves to arrive at the mate.

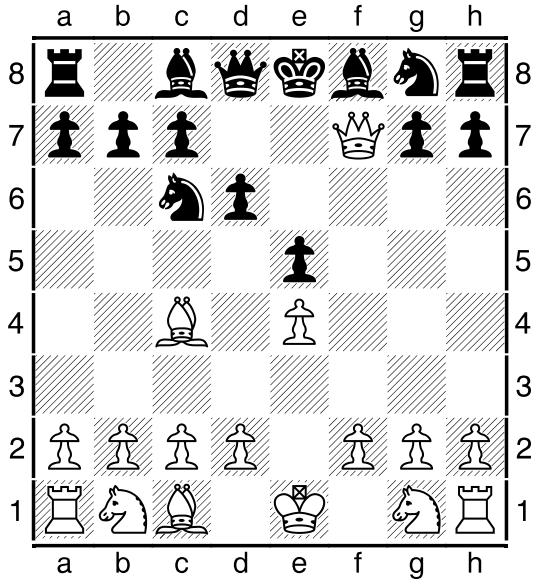
In the Fool's mate, we notice that the black king is in checkmate because no pieces can block or capture the Queen at h5, nor can the king move out of the way. He will be captured on the next turn.

In the four move mate, the offending White Queen at f7 is protected by the bishop at c4. The four-move mate is a risky endeavor because it involves bringing the Queen out very early. In the safer Fool's Mate, if black does not open up the diagonal on his second move, the white queen can remain in her starting position while leaving white the two center pawns.



FOOL'S MATE

1. e4 f6
2. d4 g5
3. Qh5++



4-MOVE MATE

1. e4 e5
2. Bc4 d6
3. Qf3 Nc6
4. Qxf7++

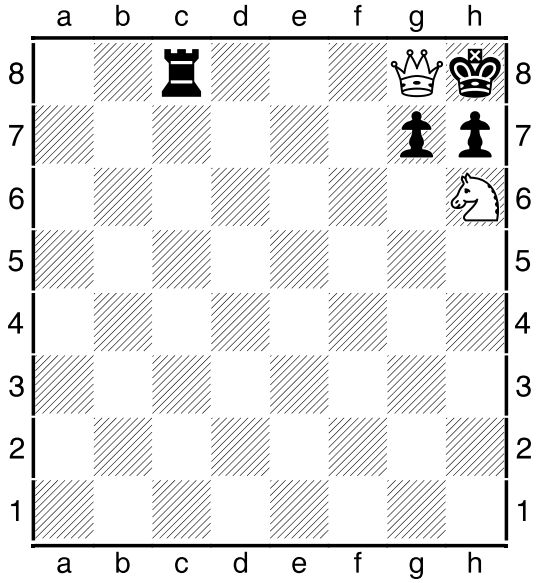
These are only two examples of early mates, but both rely on the weakness of the f-pawn. On both sides, this is the weakest pawn at the start of a game because it is only protected by the king. Every other pawn is protected by one or more pieces. This is important to remember in our opening moves.

ENDGAME: CHECK AND CHECKMATE

In the above examples, we looked at mating patterns that can happen early in the game if we are not careful. Before we turn to common endgame checkmates, let's look at the smothered mate. This is a special kind of mate which rarely actually happens, but it can be a threat.

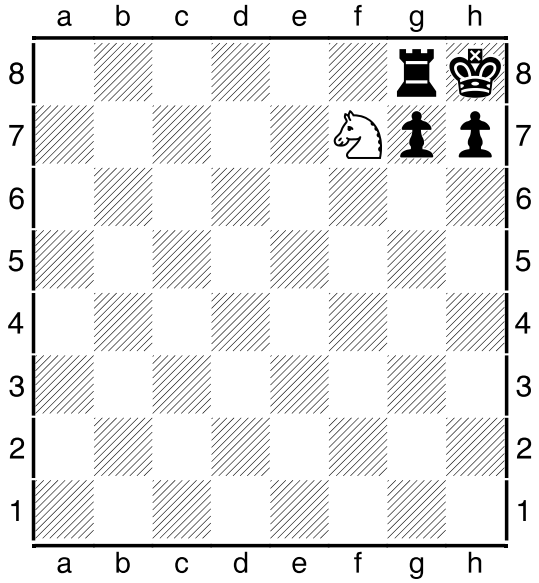
In the "Smothered Mate #1" diagram, we see that white's Queen is checking the black king. At first glance, this may not seem like such a good idea because she can be recaptured by the black rook. Notice, however, that the black king cannot capture the queen because she is protected by the white knight on h6, so black's only option to stop check is to capture the queen with his rook. This turns out to be disastrous because the white knight can issue checkmate by moving to f7.

Once on f7 (#2), the knight attacks the king. Black cannot capture the knight, cannot move the king because of the pawns and rook, and cannot block the check because it is a knight. This is the famous (or infamous) smothered mate.



SMOTHERED MATE #1

1. Qg8+?



SMOTHERED MATE #2

1. Qg8? Rxg8 (forced)
2. Nf7++

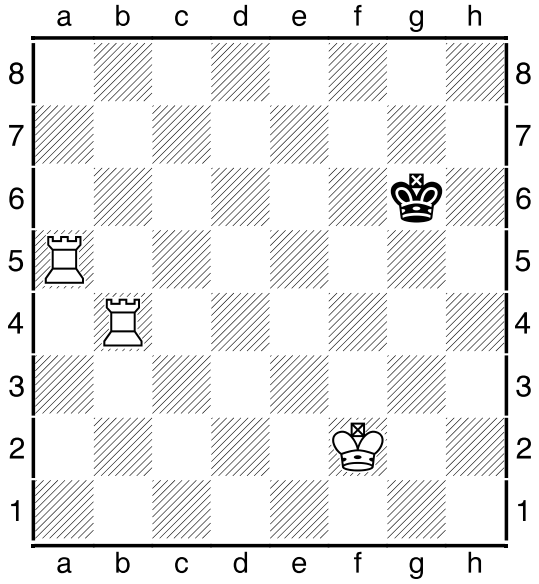
Again, the smothered mate is very rare, but it is a threat we may consider and must defend against. The idea behind studying the smothered mate is to remember that there are only three ways to defend against any check. If the attacker eliminates options for his opponent, it will be easier to checkmate.

ENDGAME: CHECK AND CHECKMATE

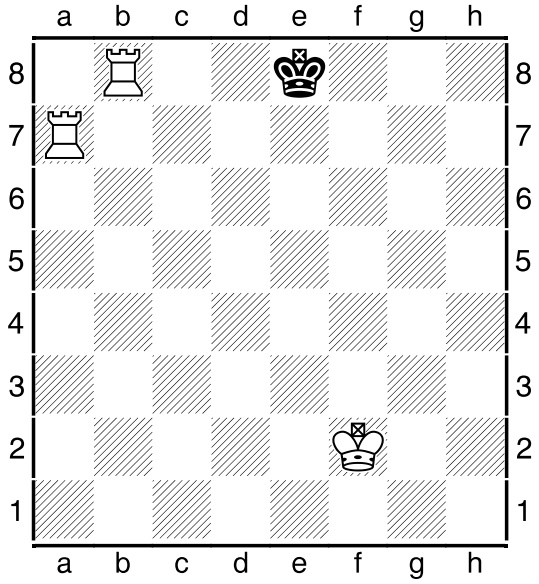
So what about checkmate patterns that you will actually use? There are as many different checkmates as there are different games. That is to say that they are infinite. By examining some common patterns, we can begin to understand the more complex checkmates and checkmate puzzles.

One common type of checkmate is the two-rook checkmate. This is when the two rooks work in conjunction to force an enemy king against a side and accordingly checkmate him. In the example below, we see the b- and a-file rooks working together to slowly force the black king up against the side of the board.

When the b-rook moves to b6, the black king cannot move down due to the rook at a5. The king has to move back because of the two rooks. Once on the 8th rank, the final move (Rb8++) is mate because the king is being attacked by the rook on b8 while his escapes are all blocked from the rook on a7. In this fashion, the rooks have stepped the king backwards into the eventual checkmate.



Rook Mate #1

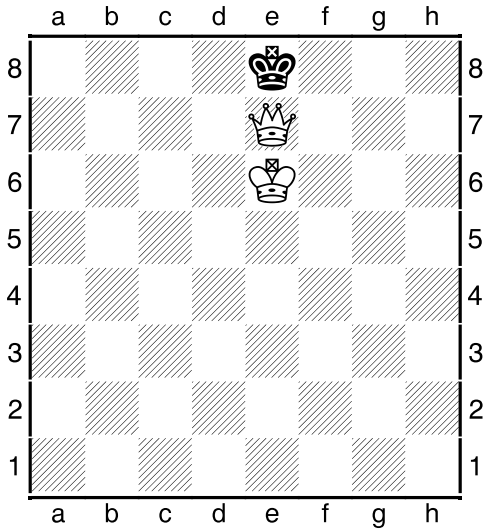


Rook Mate #2

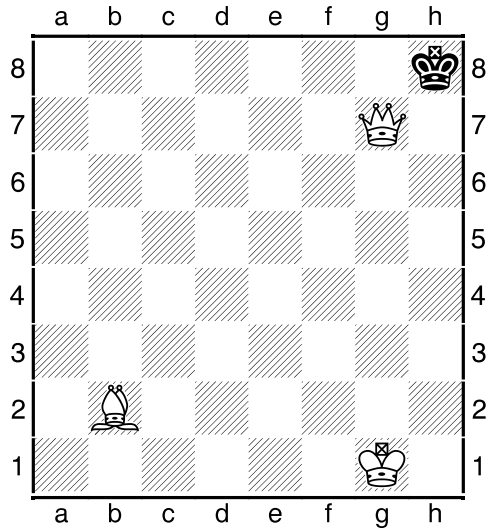
1. Rb6 Kf7
2. Ra7 Ke8
3. Rb8++

ENDGAME: CHECK AND CHECKMATE

Checkmates often involve Queens due to their tremendous power on the board; let's look at a couple of typical Queen Checkmate patterns. In the first diagram below (King and Queen Checkmate), we see the Queen has put the black king in checkmate. The black king cannot capture the Queen because that would put him in check by the white king. The Queen not only attacks the black king, but she eliminates his escape squares at d7, d8, f7, and f8. In the Bishop and Queen example, the Queen has issued checkmate again, but this time is protected instead by the White bishop at b2.

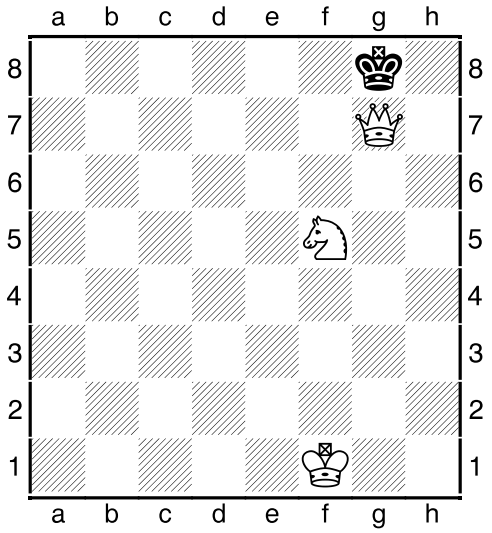


King and Queen Checkmate

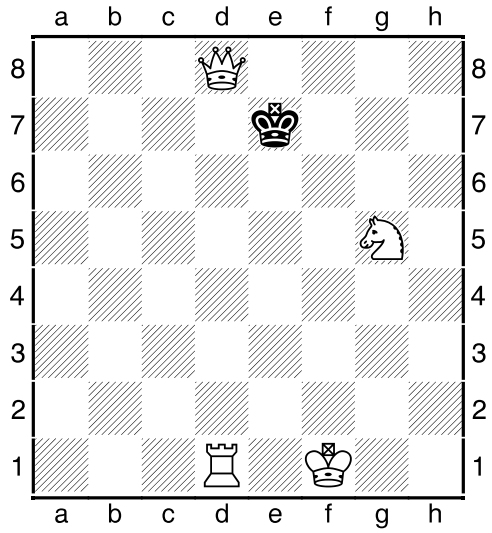


Bishop and Queen Checkmate

In the Knight and Queen example, the Queen has issued checkmate again, but this time is protected by the White knight at f5. In the final diagram, we see the Queen's weak squares. Her straight and diagonal lines leave "blind-spots" at e6 and f7. Fortunately, the white knight is supporting the queen by attacking both of those blind spots; specifically, the white knight blocks the king's *escape* to these two squares. Of course, the Queen is protected by the white rook at d1. In each example, we see that the Queen is very effective at issuing checkmates, but she does rely on the other pieces to support her.



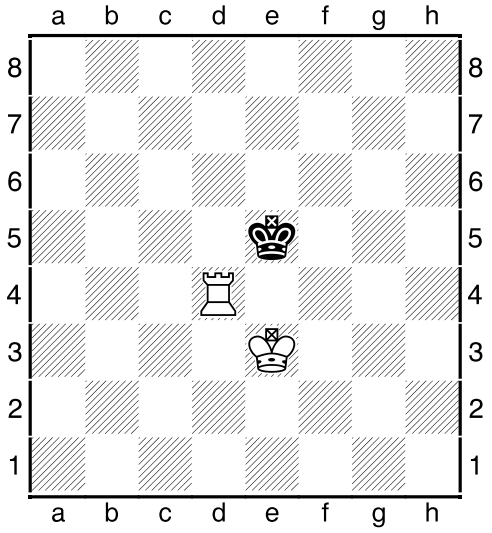
Knight and Queen Checkmate



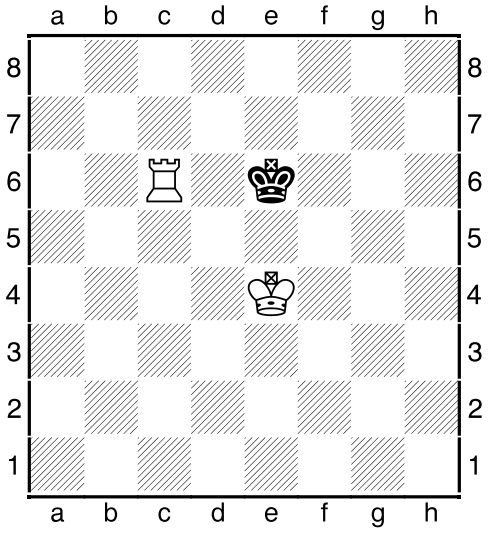
Queen's Blank Spaces

ENDGAME: CHECK AND CHECKMATE

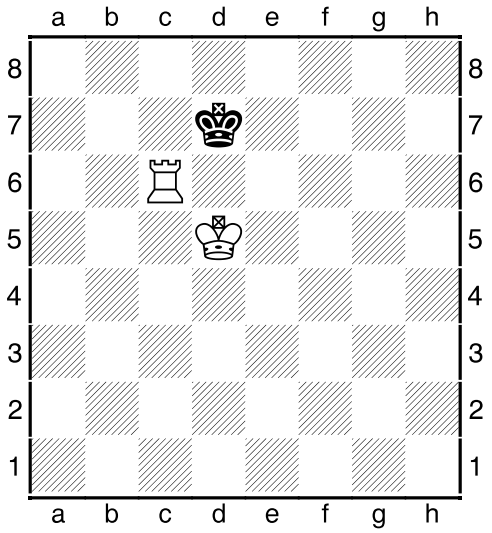
One more good checkmate to study is the King and Rook Checkmate. This is when a king and a rook work together to checkmate an enemy king. In the first example below, we see that white has a single rook and king against the black king. No matter whose move it is, as long as the rook remains at d4, the black king can only move to f5, f6, or e6 without moving into check. In order to result in a checkmate, the white team must push the black king back towards the side of the board. In the second diagram, we can see how to do this. The black king must move back to either d7, e7, or f7 because the white king guards d5, e5, and f5 while the rook guards d6, e6, and e7. If the black king decides to move to d6, the white king can defend the rook by moving to d5 (see diagram #3). In which case, the black king again only has three squares to move to. Because black has to move, he is forced into a bad position. The way to end the game is to then force the black king against the side where he has no more escape squares, as in diagram #4. The exact sequence for this can be intricate, but the key concept is that the king acts as a wall. The king attacks all squares around him, therefore an enemy king cannot move into those squares.



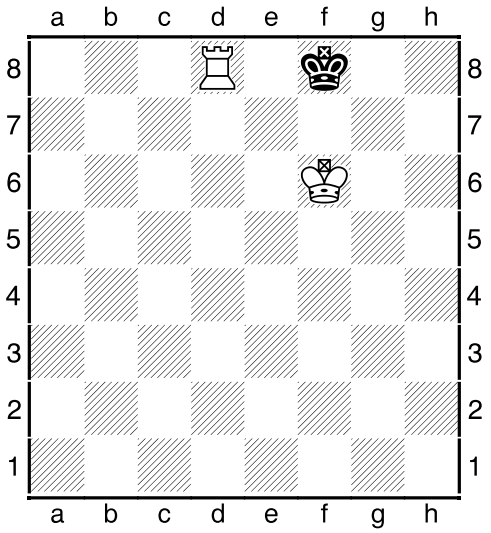
King/Rook Endgame



Pushing back the enemy



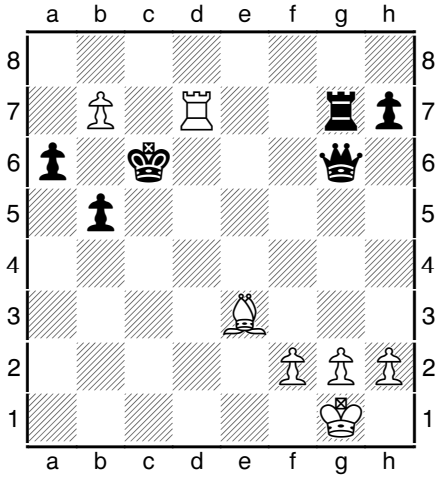
Forcing Black Back



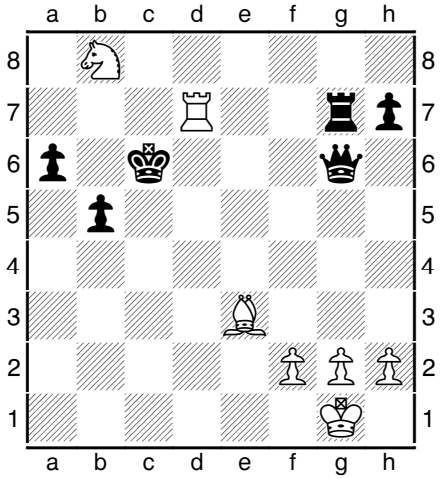
King and Rook Checkmate

ENDGAME: CHECK AND CHECKMATE

The key to any checkmate is to attack the king with a piece which cannot be taken while blocking the king's escapes. Remember, the three ways to escape check are to move the king away, capture the attacking piece, or block the check. When we look for ways to avoid all three, we can successfully end the game. Look at the diagram below. How can white checkmate the black king on the next move?



At first glance, we may realize that Black is about to issue a checkmate of his own by Qxg2++. However, white has a move first. If white moves the b-pawn to the 8th rank, he has the option of promotion. If White promotes to a Queen, black can issue his checkmate and win the game. However, if White promotes the pawn to a knight, the knight will be attacking the black king (check) while simultaneously defending the rook at d7. The knight cannot be captured, so that option is out. No black pieces can be put in the way of the knight's attack. There goes option 2. Finally, the king cannot escape to b7, c7, d5, or d6 because of the rook, nor can the king move to c5 or b6 because of white's bishop at e3. Finally, the king cannot capture the rook as an escape because it is protected by the knight. White has won the game.



b8=(N) ++

In the example above, we see an elegant checkmate which utilizes many pieces. When all your pieces work together fluidly, you may find other elegant mates of your own.

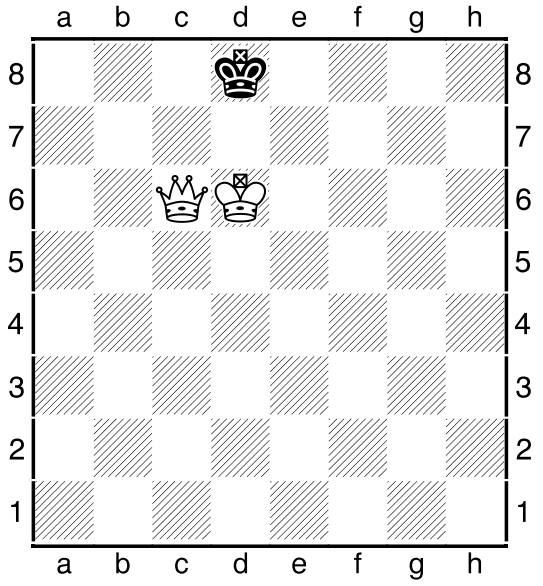
ENDGAME: STALEMATE AND BASIC DRAWS

Besides Checkmate, chess games can end in one of two types of draws. A Stalemate is when a player has no more legal moves left but is not in checkmate. A drawn game is one where neither player has the possibility of checkmating the enemy king. There are two types of draws: 1) draw by insufficient material, and 2) draw by three-fold repetition.

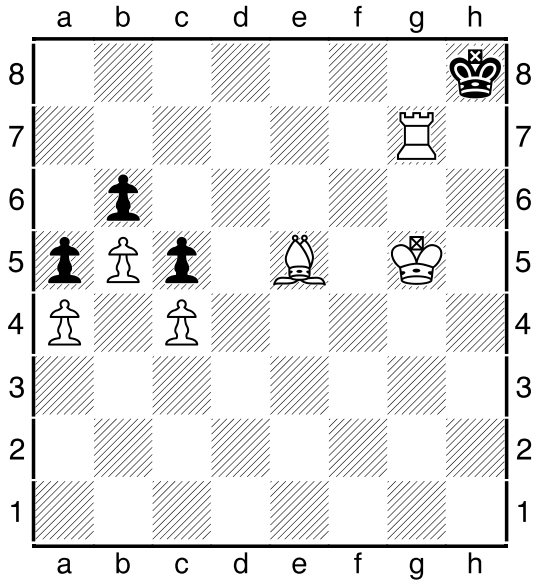
Stalemate

The definition of a stalemate is when one player can no longer make a legal move. A game that ends in stalemate is said to be drawn. Neither player has won or lost the game. This can be a good thing or a bad thing. If you are in a position to checkmate your opponent, but you make a mistake and stalemate him, you have lost your winning opportunity. However, if you are in a position to lose a game but work your way into a stalemate, you have successfully escaped a loss. We must be on the lookout to not stalemate an opponent while also being aware of the opportunity to work our way into stalemate if we are losing.

Let's look at some examples. In diagram #1, if it's black to move, the black king is in stalemate. Though white has a huge advantage by having a queen and king against the black king, he has thrown away this advantage. The black king cannot make any moves. The c7, d7, and e7 squares are all blocked by the white king, and the white queen attacks c8 and e8. If it is black to move, remembering that a king cannot move into check, black has no legal moves and has therefore drawn the game.



Stalemate #1

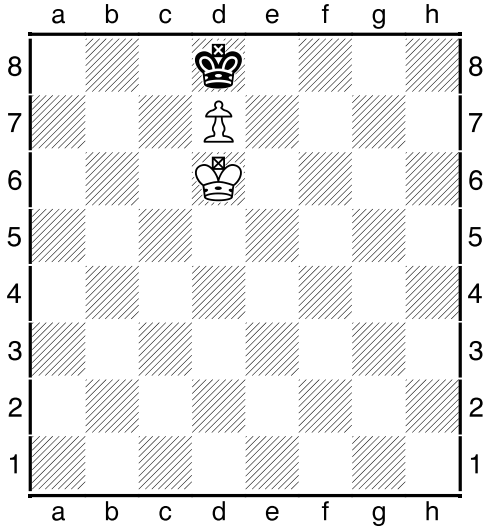


Stalemate #2

Another stalemate to avoid is shown in diagram #2. Here again, white has an advantage of material. White has a Rook, Bishop, and King against black's single piece. Yet again, white has squandered this advantage and moved his rook to g8. Black has no legal moves to make, so the game is a stalemate. The way to avoid these two stalemates is an intricate process, to be explained in a later lesson. For now, just know what a stalemate is and try your best to avoid them if you're winning. If you're losing, try to find them!

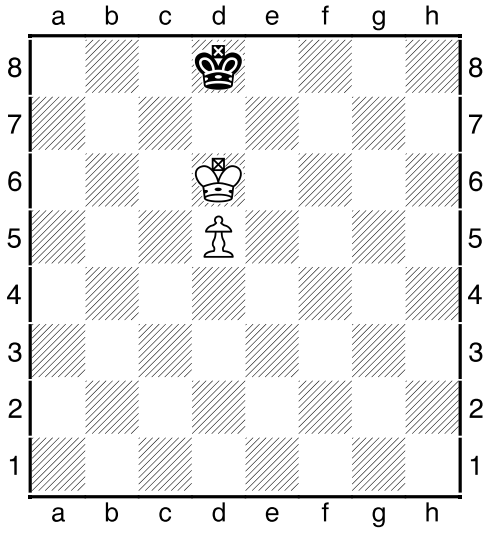
ENDGAME: STALEMATE AND BASIC DRAWS

We do have one more stalemate which deserves some close attention before we move on to draws. It involves the king and pawn endgame. This is when one player has only a king and a single pawn while the opponent has only a king. Below, we see the black king is stalemated because it has no legal moves and is not under attack. This is a tricky way to avoid an enemy promoting his pawn to make the endgame easier. If you were black, you want to try and get here. If you're white, you've wasted an advantage which could have won you the game.

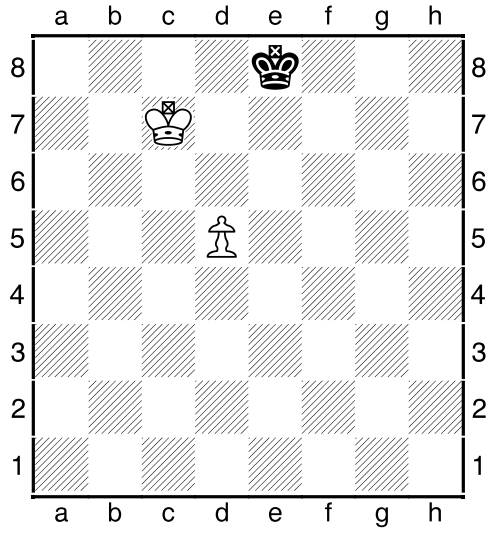


King and Pawn Stalemate

In the first diagram below, we see an important concept. In order to ensure that you can promote your pawn, make sure your king reaches the sixth rank ahead of your pawn. If it is black's turn to move, the king must move either right or left (see also: Opposition). If he moves to the right (e8), the white king moves forward and to the left (or vice versa). The white king now protects the three squares leading the pawn to promotion. White will easily win once the pawn is promoted at d8.



King and Pawn Endgame



White wins...

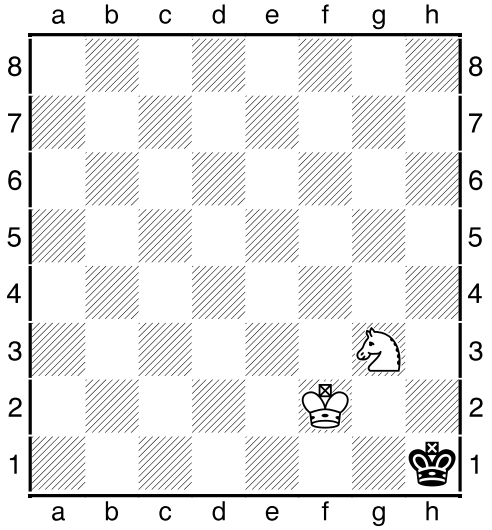
These are just a few examples of simple stalemates. Use this knowledge to your advantage in your competitions! Now let's turn our attention to draws.

ENDGAME: STALEMATE AND BASIC DRAWS

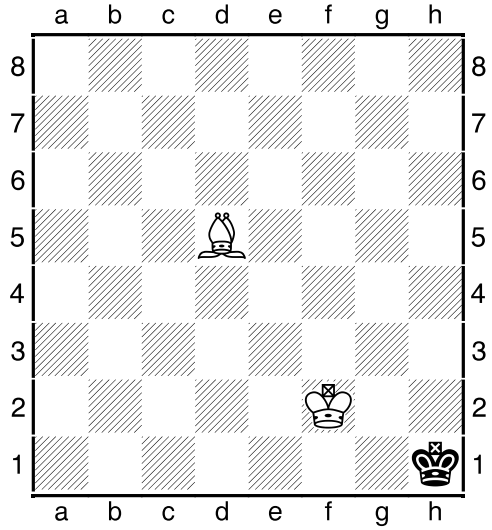
Draws

Just as with stalemate, a draw is a bad thing to someone who has an advantage in a game. However, if you are losing a chess game, fighting your way into a draw is considered a successful game!

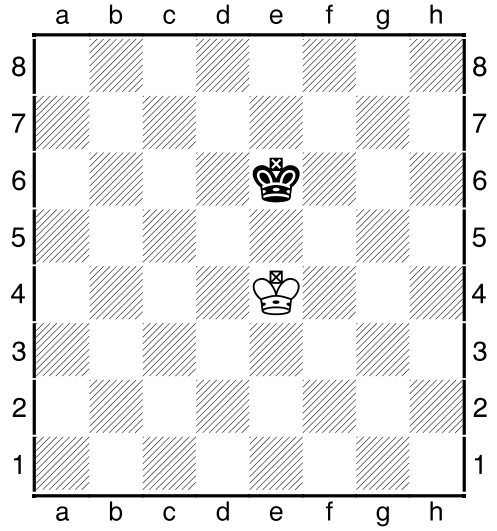
The first type of draw is a draw by insufficient material. The three draws by insufficient material are: a king and a knight versus a king, a king and a bishop against a king, and a king versus a king. A king and a knight are never enough to checkmate an enemy king. In the example below, we see that the black king is in check, but once he escapes to h2, white's only option is to move the knight or abandon it. Moving the knight anywhere would allow the black king to escape to h3 or back to h1. White can never checkmate black. This would be considered a draw by insufficient material. The same is true of a king/bishop vs. king endgame because no matter how the bishop attacks the enemy king, he could always escape to an opposite color square. Obviously, if all pieces were off the board, and the game was simply a king vs. king game, neither king could ever checkmate his opponent.



King and Knight vs. King



King and Bishop vs. King

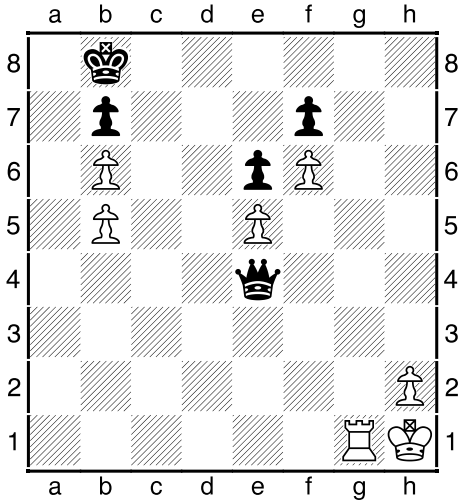


King vs. King

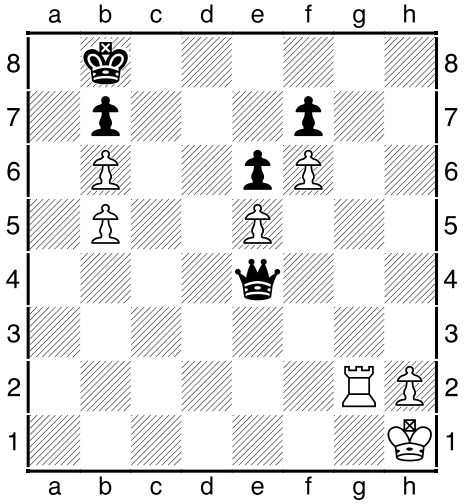
The other type of draw is called a draw by three-fold repetition. This is when both players repeat the same move three times in a row. If you have an advantage, it is pretty hard to accomplish this; however, we must be on the lookout for a chance for our opponent to force us into the same three moves. This is a great way for a losing player to avoid a complete loss, should the opportunity arise.

In the diagram below, the black queen has checked the white king in the nick of time. If the white rook is allowed to move, it will issue checkmate at g8. However, Black has the somewhat disappointing retort of issuing perpetual check (which ends in the same moves being repeated three times). So the black Queen has issued check, and white's only defense is to move the Rook to g2 (see diagram #2). Black then reissues check by Qe1+ (#3). Again, white's only response is to block with the rook Rg1 (#4). Black can continuously issue the checks in order to prevent white's rook from issuing mate. However, black can never checkmate the white king because of the mobile white rook. Black's only chance to tie the game is to continuously check white. The game ends after the move is repeated three times, and Black has prevented a loss.

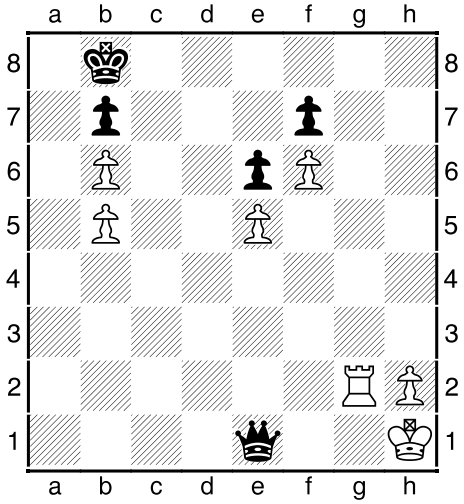
(Black actually has other options of defense, but the diagram is for demonstration only)



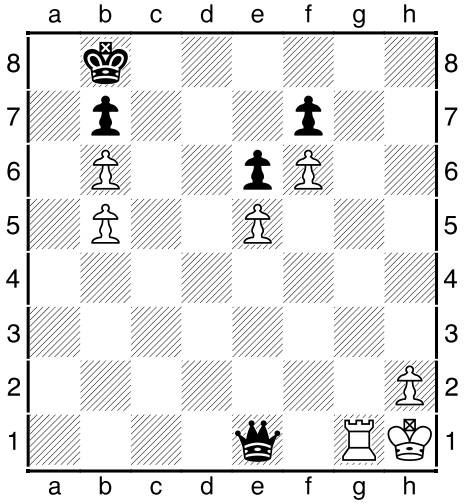
Perpetual Check #1



Perpetual Check #2



Perpetual Check #3



Perpetual Check #4

RECORDING GAMES: HOW TO READ AND WRITE CHESS NOTATION

So why annotate your game? Simple. It gives you a record of your game so that you can go back and study your moves, your opponent's moves, missed opportunities, and spectacular brilliancies! Remember, you can always learn more about chess, and knowing notation will help you evolve! PLEASE look in the back section for a helpful "Notation Cheat Sheet" that explains notation very succinctly.

To write down a chess move, you must know:

1. Which piece you are moving
2. The square that piece is on
3. The square the piece will move to

Chess pieces have letters associated with them:

- K = King
- Q = Queen
- R = Rook
- B = Bishop
- N = Knight
- Pawns have no letter since they always reside on one particular file of the board, therefore each pawn is identified by its square alone

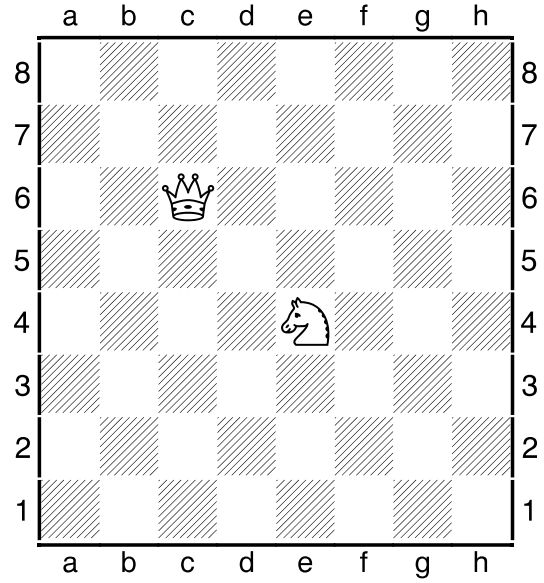
Each square on the board is denoted by the coordinate of the:

FILE letter (lowercase a – h) and the

RANK number (1 – 8).

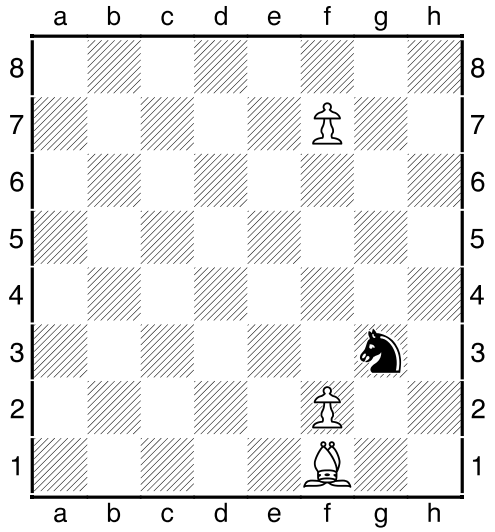
Square **a1** is the lower left hand corner of the board, as seen from white's side.
Square **h8** is the upper right hand corner of the board as seen from white's side.

A piece's location combines its letter and the coordinate. For example, the queen below is at Qc6. The knight is at Ne4.



RECORDING GAMES: HOW TO READ AND WRITE CHESS NOTATION

Moving Pieces



Let's say we wanted to move the white bishop from f1 to c4. The correct notation is:

Bf1 – c4

The **B** indicates that we will be moving a Bishop. The **f1** indicates that we will be moving the Bishop on square f1. The dash tells us that this is just a move, not a capture. The **c4** tells us that the Bishop from f1 will move to c4.

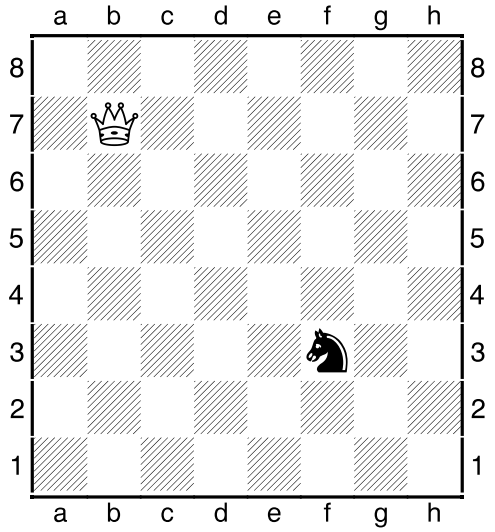
Pawns:

If the white pawn were to move forward two squares, the move would be written: f4
Notice that there is no need to write the beginning square since the f-pawn will always be the f-pawn. However, if it were to capture the black knight, we would write:

f x g3

When a pawn is promoted, we write the pawn move, an equal sign (=) and the piece it promotes to. So, if the f7 pawn advances and promotes to a Queen, we would write:

f8=Q



If the white Queen were to capture the black knight, it would be notated as follows:

Qb7 x f3

The main difference in capture moves is the use of an X instead of a dash.

RECORDING GAMES: HOW TO READ AND WRITE CHESS NOTATION

Castling:

Castling is notated in a unique way.

Castling kingside (white) is written: 0–0.

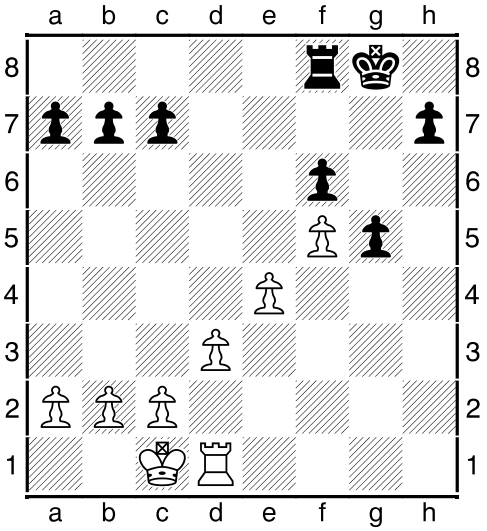
Castling Queenside (black) is written 0–0–0.

Just remember, if the rook moves two squares, use two zeros; if it moves three squares, use three zeros.

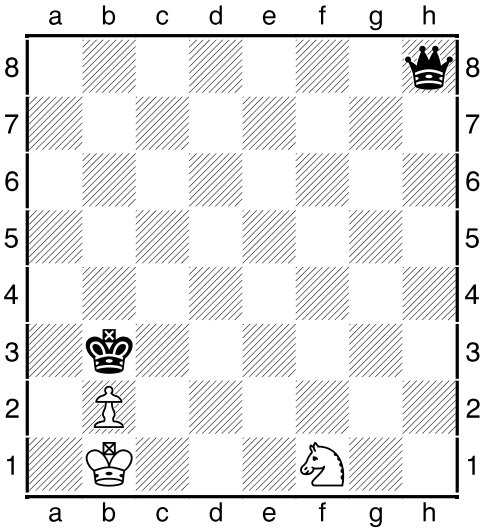
En passant:

En passant is notated like a capture move, with the addition of **ep** after. For example, below:

f x g6 ep



Check and Checkmate:



When a move places the enemy King in check, we add a (+) to the move.

For example, if the white knight moves to **d2**, we would write: Nf1 – d2 +

If the move is a checkmate, we add (++). For example, if the black Queen captures the white pawn at b2, we would write: Qh8 x b2++

RECORDING GAMES: HOW TO READ AND WRITE CHESS NOTATION

Special Marks

Sometimes, while studying a game, you may find a questionable move. These moves should be noted by adding a (?) to the end of the note. For example: Bc1-f4? This way, you narrow your study to the position of that one move. This isn't to say that the other moves are perfect, but you may notice that this move is a blunder.

On the other hand, you may notice that one particular move solves many issues in a particular position. Moves which stand out as being particularly brilliant should be noted by adding an (!). For example, Qb4-d7!

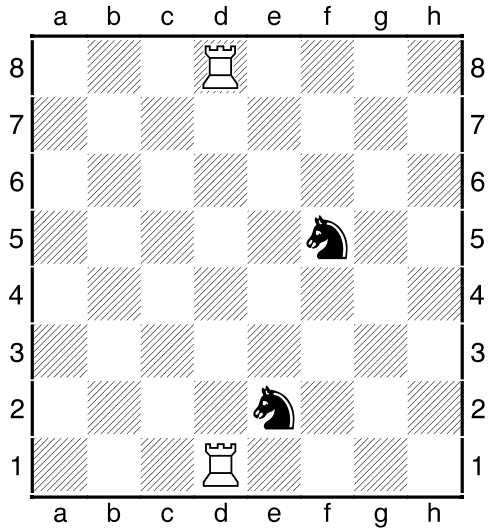
Occasionally, a move may be both questionable and brilliant, denoted by the combination of these marks (?!). These symbols are really only useful when studying games, and would rarely be assigned to moves during a competition.

Shorthand Notation

Once you have become familiar with Chess Notation, the above method is commonly referred to as algebraic notation due to its reliance on coordinates; you may find it rather obtrusive during games.

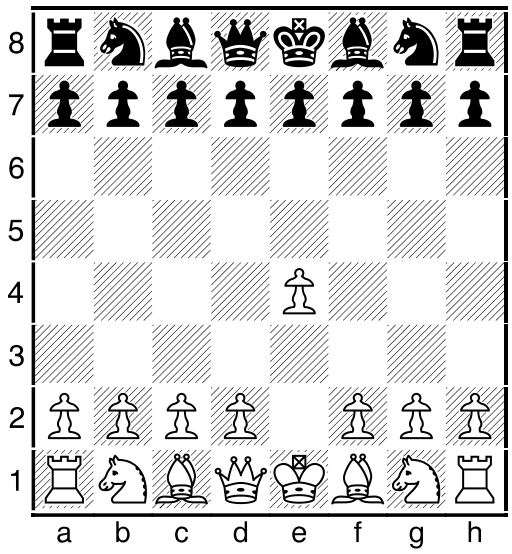
One method of making Chess notation simpler is to leave off the originating square. The idea is that, for example, there is only one Bishop that can move to f4. Therefore, why write Bc1-f4 when it is easier to write Bf4, showing the same move. Bf4 says that a Bishop moved to f4.

However, sometimes, there may be two pieces that can move to the same square. Obviously, this is impossible with Bishops because there is a light and a dark square bishop, however, two knights may move into the same square, or two rooks may move into the same square. If the two pieces reside on different files (whether knights or rooks), which piece moves is denoted by the file which it occupies. For example: Nfg3 means that the knight on the f-file moves to g3. However, if both pieces occupy the same file, the piece is then designated by the rank which it occupies. For example, R1d3 means that the rook on d1 will move to d3, not the rook on d8.

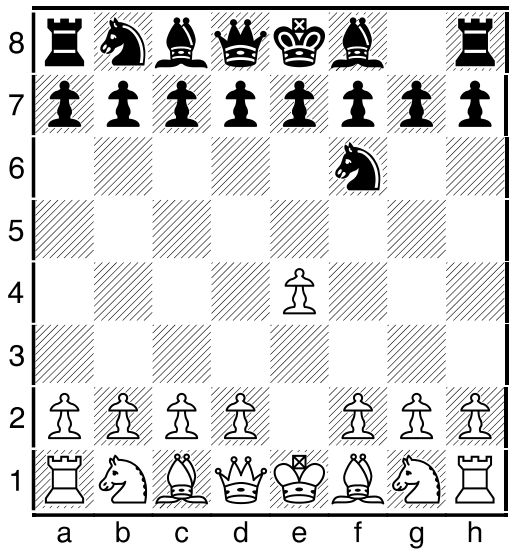


RECORDING GAMES: HOW TO READ AND WRITE CHESS NOTATION

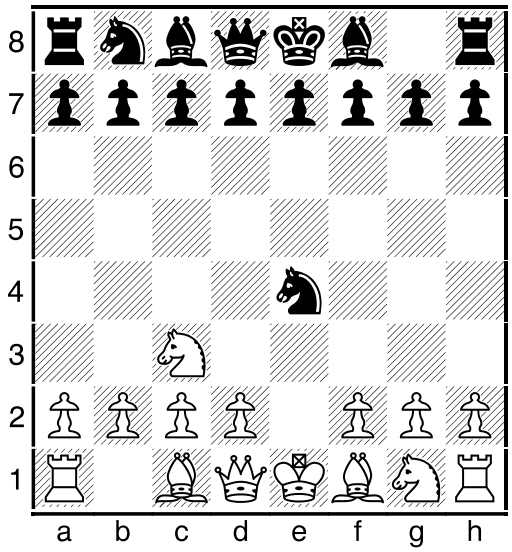
Finally, let's look at a series of moves and how we would notate them.



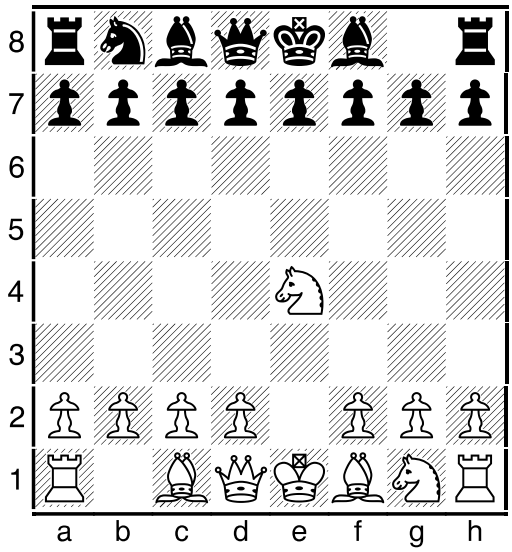
1. e4



1. e4 Nf6



1. e4 Nf6
2. Nc3 Nxe4



1. e4 Nf6
2. Nc3 Nxe4
3. Nxe4

Now that you know how to notate games, start keeping track of your own so that you can study them! Also, there are hundreds and thousands of games from historical games that you can study because of the gift of chess notation.

SECTION 2: INTRODUCTION TO STRATEGY

➔ BASIC DEFENSE

- ► This section of the manual very briefly explains the options a player has when defending against an attack. It only covers immediate attacks, not long-term threats. This section is designed to help a beginner see and remember his options.

➔ ELEMENTS OF CHESS

- ► This section of the manual explains the three basic elements of every chess game: Material, Position, and Time. A number of examples are given to help explain this difficult concept. Without grasping these three elements, however, a deeper understanding of chess strategy cannot begin.

➔ ATTACKING TACTICS

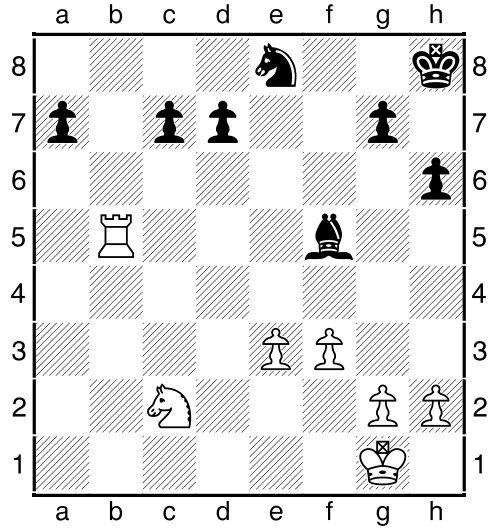
- ► This section of the manual explains the tactics of chess. Included are explanations of: Forks, Pins, Skewers, Discovered Attacks, and Removing the Defender. These are the tactics used by every chess player in every game. Using these tactics in various combinations and threatening these tactics in various combinations is the basis for all strategy in chess.

BASIC DEFENSE: WHAT TO DO WHEN ATTACKED

One of the basic concepts in chess is that you must attack an opponent across the battlefield. Often, as we are starting out, we may get overly aggressive and forget the basics of Defense. This lesson is meant to focus on a very basic idea of chess defense: your options when you are attacked. There are 5 main options:

1) move the attacked piece away from the attack
2) block the attack by placing another piece in the way of the attacker
3) capture the attacking piece
4) defend the attacked piece with another, or
5) present a counter attack.

We will examine each option briefly using the diagram below where the black f5-bishop is attacking the white c2-knight.



Option #1: moving an attacked piece away from the attack

In the diagram, the white knight has the option to simply move away. It can move to a1, a3, b4, d4, e1, or f2. Notice that moving to d4 would also present an attack to the black bishop.

Option #2: Block an attack by placing another piece in the way.

White can also block the attacking bishop by placing the e-pawn in the way. It just happens that, in this diagram, pushing the e-pawn would both block the attack to the white knight as well as attack the black bishop.

Option #3: Capture the attacking piece

Another option to consider is capturing the attacking piece. Here, white can capture the invasive bishop with the b5-rook. This would eliminate the attacking piece and place the rook on a half-open file.

Option #4: Defend the attacked piece

The final main option in defensive thinking is to simply defend the attacked piece. Here, the b5-rook can move down to b2 and protect the knight. This way, if the black bishop captures the knight, the rook can recapture by taking the bishop.

Option #5: Present a counter-attack

Another idea in defense is the counter-attack. The basic concept is that, by counter-attacking your opponent, you force him to choose to either continue his attack or defend against your attack. In the above examples, we saw a few options that both defended the knight and attacked black at the same time. Another counter-attack option is to move the white rook to b8. White would offer a knight for knight trade. However, White captures with check. If black defends the knight, white can then defend the knight on the next turn.

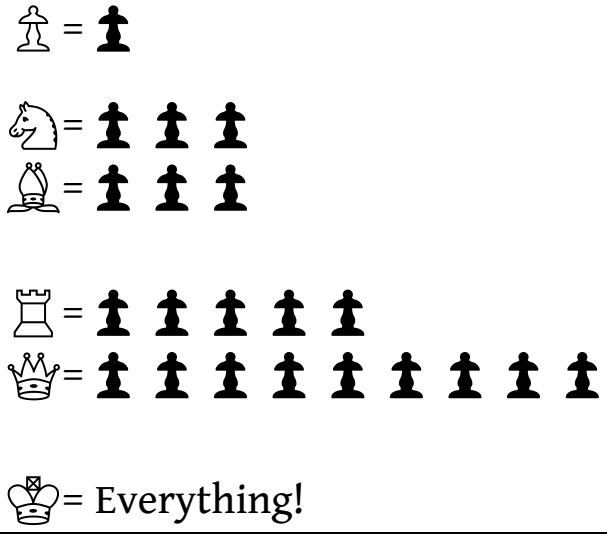
BEGINNING STRATEGY: MATERIAL, POSITION, AND TIME

Before delving into the more strategic side of chess, you must understand one central concept of the game. There are three aspects to every game. Some players are better at playing for one aspect than another. Knowing where your opponent is strong and weak can help you adjust your own play. The best chess players manipulate all three aspects within each game. The three central aspects of chess are:

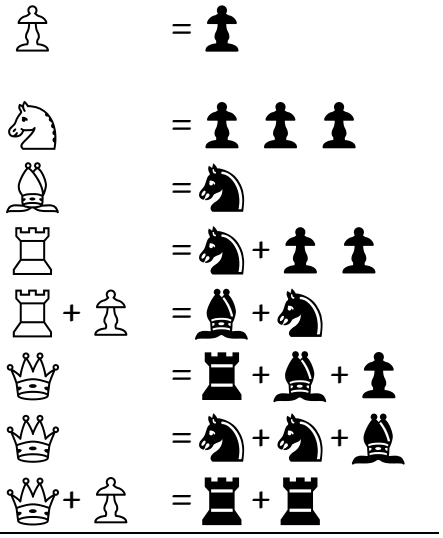
1. **Material** – the number and importance of a player's pieces
2. **Position** – the layout of the board relative to the location of pieces and their influence over the squares on the board
3. **Time** – the number of moves a player has to take in order to execute any given strategy

Material

When beginning, most players focus on material, and this is a good place to start discussion of strategy. To begin, we assign each piece a value according to the pawn number of pawns it is worth. Below we see the designations. Each pawn is valued as a pawn. We use the pawn as a measurement because it is the weakest piece on the board (remember, though, we have 8 of them!). Each knight and bishop is valued at about 3 pawns. We will explore these pieces in greater detail later, but a bishop can be worth more than a knight, and vice versa. The true value of a knight or bishop comes from the position of pieces on the board. Next, the rook is valued at 5 pawns, and the Queen is valued at 9 pawns. Of course, the king has no pawn value because we cannot allow him to be captured.



MATERIAL VALUE



APPROXIMATE COMPARISONS

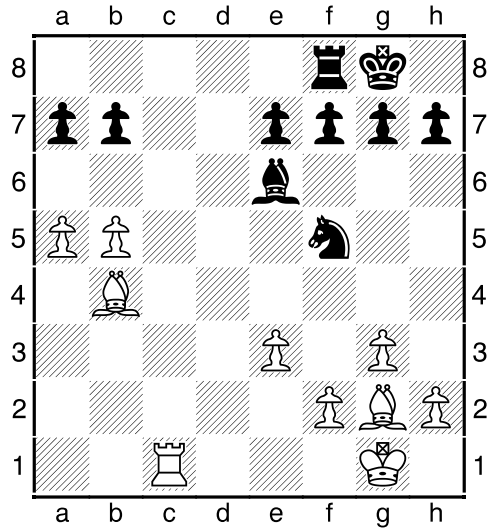
The reason we look at values is because it helps us decide whether a certain trade is worth the move. For example, if we can capture an enemy's Queen while only losing, say, a knight and a pawn, we are "gaining material." Something commonly referred to as "the exchange" is when a knight or bishop is traded for a rook. A player is said to have "lost the exchange" if he has lost his rook in exchange for a bishop. However, if a player has captured a rook at the expense of only a knight, he is said to have "won the exchange." Keeping material values in mind is important, but it is only a third of the story. A massive material advantage may mean nothing in the face of a dominating position or time.

Position

The next major element of every chess game is the board position. At any given moment, Black and White pieces are scattered across the board, influencing certain areas. We analyze positions by scoring how much influence each player has.

In the diagram below, we can see that, according to material, the players are even. However, according to position, White has huge advantages. White's rook is influencing c5, c6, and c7 in black's territory. The rook's influence over c8 is minimal because black has c8 covered by both his rook and his bishop. White's bishops are both aiming at vulnerable squares in black's territory, as well. Notice White's a- and b-pawns are both in black's territory while also influencing squares in black's territory. White's kingside pawns also have a strong hold of black's knight, keeping it from moving into white's territory any time soon.

Notice also that white's "good bishop" is his light-square bishop because most of his pawns are on dark squares. The light-square bishop is considered "good" because it can move freely around its own pawns while attacking black's pieces. On the other hand, white's "bad bishop" is still not too bad because it still has some mobility. If it were to pull back deeper into White territory, its options would be further limited. Because it is perched ready to invade black's territory, though, it is still usable and, therefore, not all that bad. Black's position is weak for many of the above reasons, but also because its pawns are not advanced, its rook has no hope for decent development, the knight is hemmed in by white, etc., etc.



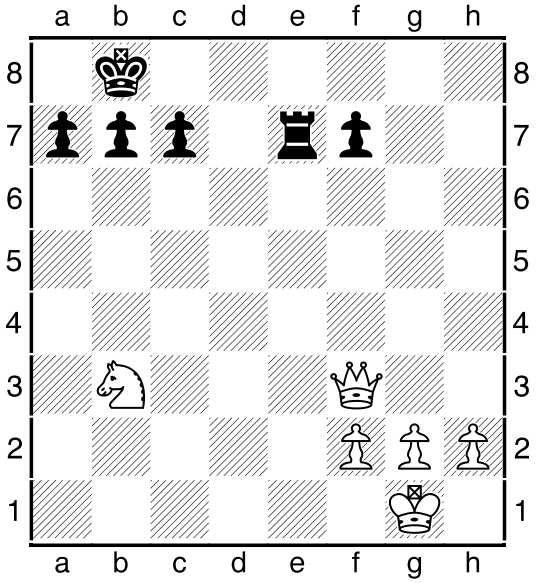
Equal Material does not equal a better position

This is a very simple study of the basics of what is called "board position," but the basics are all here. Though the material is even, white's positional advantage should translate into a win if exercised properly. When considering trades and moves, always look ahead to the position that will be created. Will the move result in a good or bad position for you? Also consider the position at hand... How can you improve your position or take advantage of your opponent's weak position? We're only beginning to scratch the surface of strategy, and before we dig any deeper, we need to turn our attention to one more element: Time.

Time

The final major element of every chess game is the element of time. What we mean by time is the number of moves it will take to execute any given operation. Time can be a very intricate concept indeed (not only in chess!!!), so remember that this lesson is a very cursory and basic introduction to the idea.

In this diagram, we see that white would like to move his knight to c5 (or a5), threatening checkmate with the Queen move Qxb7++. However, white does not have time to move his knight because he must defend against black's Rook attack at e1 (Re1++ back-rank mate). White's checkmate will take two of his moves to execute, but black's checkmate will only take one.



Time

This is a simple demonstration of how time affects the material and position. By manipulating the position and material, black has worked his way into an advantage of time. In this particular case, white must defend or else lose the game. This would be a tragedy since the advantage is easily eliminated by moving either the g- or h-pawn, giving the white king an escape, or by moving the Queen to either d1 or c3, thereby protecting the e1 square from attack by the black rook.

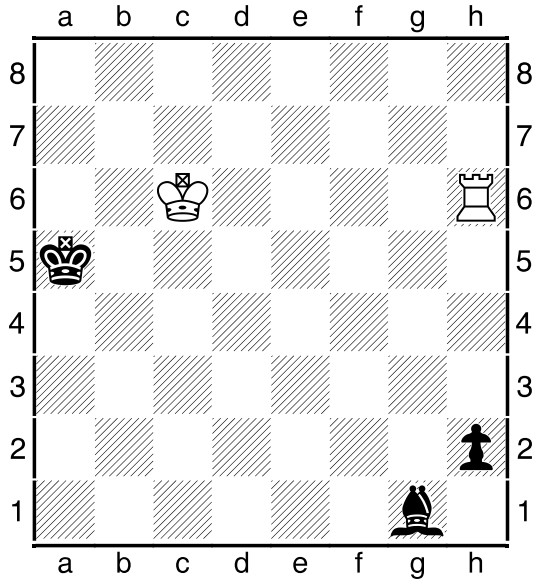
Because using Time to our advantage is a very complex skill, I have saved it for last. Threatening with time is effective at every point in the game. To discuss this element further, we would need volumes, not pages. This cursory understanding should help you develop further. Just be aware that you can threaten a future move and force your opponent to defend. This will open up other possibilities for you. On the other hand, be aware that you can (and sometimes must) defend against possible future moves by being aware of how many moves it will take your opponent to reach a certain threat. For now, be aware and be vigilant!

Combining the Elements of Material, Position, and Time

The essential goal of understanding these elements is to build upon our understanding of strategy in chess. When we develop attacks and defenses, we are considering all three elements and manipulating the one which will produce the best result for us.

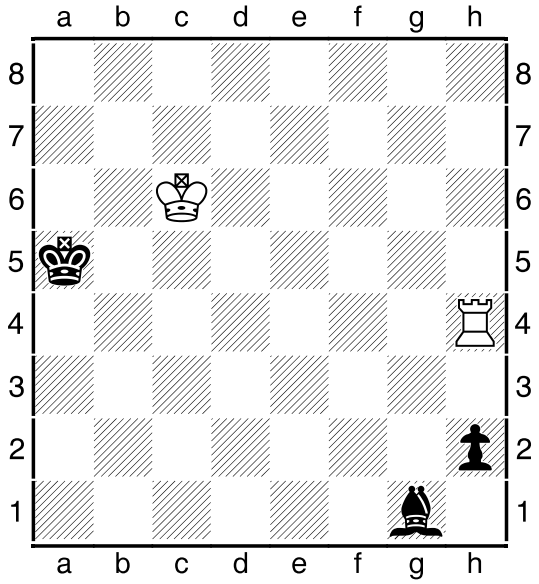
In the diagram below, we see that white has a material advantage, and a positional advantage. However, black has the advantage of time. Here's why... White has a Rook (5 points). Black has a pawn and a bishop (1+3=4 points). White has a positional advantage because his rook is mobile and can attack many squares at the same time. Black's bishop is not free to move because it is defending the pawn at h2. Black has the advantage of time, though, because he is one move away from promoting the h-pawn. If white moves his rook off of the h-file, the pawn will promote, translating into a huge material and positional advantage for black. Black's advantage is minimal because he must defend the pawn as long as the rook threatens to capture. Consequently, black's best strategy is to try and make moves with his king towards the corner to safeguard the promoting square. White's strategy is to keep the black king away from the corner.

If white is to move, then, what is his best option? How can white translate his material and positional advantage into a win?



Dilemma, Dilemma...

If white checks the black king from h5, the king will begin his advance towards the corner (perhaps Kb4). If white blocks the black king by moving Kc5, the kings will dance up and down their respective files never accomplishing much at all. Moving the rook anywhere off of the h-file will result in black gaining a Queen which will make things extremely difficult for white. White may be able to manage a draw by insufficient material, but it will be difficult. From this position, white does not need to draw, white can win. White needs to find a way to impede the black king's motion while maintaining his defense of the h1 promoting square. Where to move?
Let's try...



1. Rh4

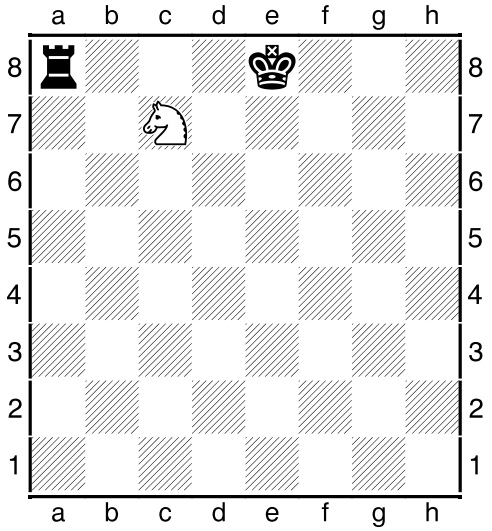
Now it's black's turn to move. What are his options? Option 1: promote the pawn. This results in the rook capturing the new piece (2. Rxh1), and white will win the game. Option 2: 1. ... Ka6 (the black king's only option to move as he is blocked by the white king and rook) which results in an immediate checkmate (2. Ra4++). Option 3: move the bishop anywhere along the g1-a7 diagonal. This results in the rook taking the h2 pawn, removing the promotion threat, and white will win the game.

In this example, white translated an advantage of 2 elements (material and position) to trump the single element advantage (time) that black had. This is the heart of strategy in chess: know your advantage and use it to overtake your opponent's advantage. This lesson is a very *simplistic* demonstration of the basics of strategy. There is <u>much</u> more to learn as far as strategy goes, but understanding these three elements will help you understand why a move may not seem advantageous when, in fact, it really is a winning move. Manipulating Material, Position, and Time in combinations makes for good strategy. However, accomplishing effective manipulations of these elements is challenging and can always be improved. The goal of chess players is to manipulate these elements to their own advantage while defending against their opponent's manipulations. Grandmasters have grown to a point where they understand these concepts quite a bit more than the average player. However, as we study masters of the game, we can see that each player (including the masters) has strengths and weaknesses. We must <u>continually improve</u> our understanding of these basics in order to advance our play.

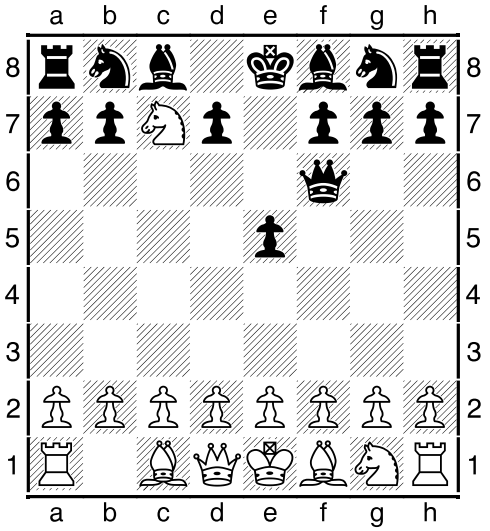
YOUR ARSENAL: FORKS

One chief tactic in chess is attacking two points at the same time. Our opponent cannot defend two threats with the same move. Of course, that means that we cannot defend them either. It stands to reason, then that we should find ways to attack twice at once while defending against the exact same types of moves.

A simple way to attack two pieces in a single move, with a single piece is to create a "Fork." A fork is when a piece is attacking two pieces at the same time. In the first diagram below, we see that the white knight is forking black's king and rook. Because black must use its move to end the check, the knight is free to take the rook at a8. Black must defend against the check; this is the most powerful type of check. Black cannot defend two attacks and is forced to defend the king.

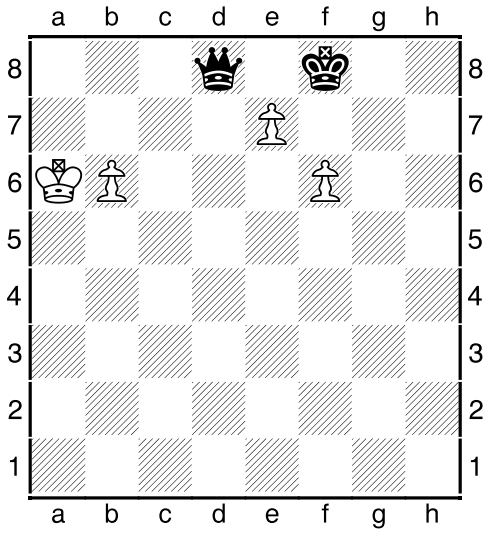


Knight Fork

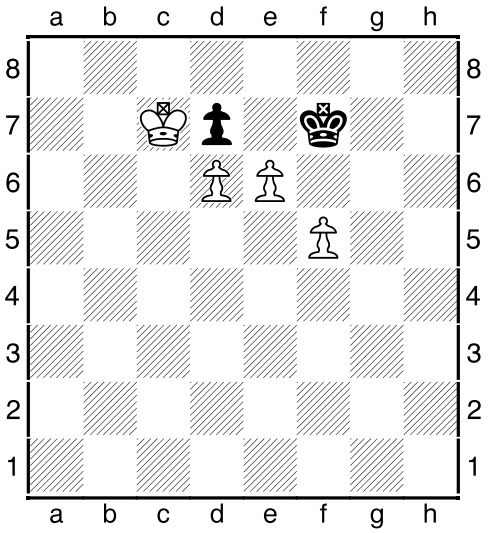


...with pieces

Knights are particularly effective at forking pieces because of their "L" shaped motion. They can attack rooks, queens, and bishops without being in their lines of fire. The knight's ability to fork makes it quite and valuable piece, but even the lowly pawn can issue devastating checks. Below we see two examples. In the first, the pawn is again issuing a checking fork and will win black's queen. The second is a powerful endgame fork, forcing black to decide how to defend without allowing white to promote.



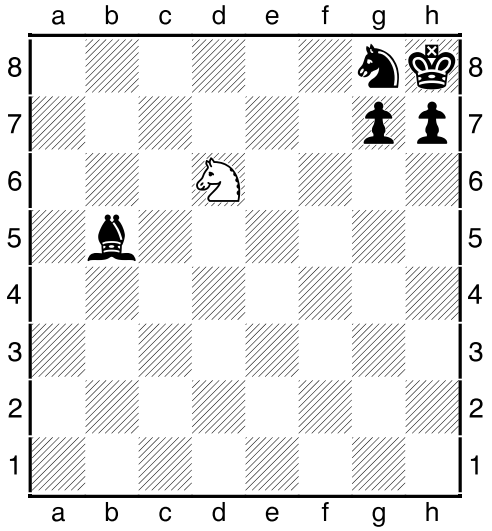
Lost Black Queen



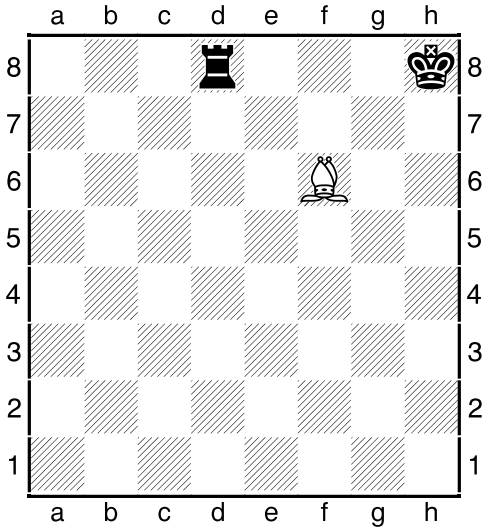
Lost Black Game

YOUR ARSENAL: FORKS

Forks are effective in many ways. One important thing to remember is that you can attack squares as well as pieces. Below, the white d6-knight is attacking the black b5-bishop and the square at f7. Black must defend against the smothered mate (Nf7) and will consequently lose the bishop. In the second diagram, we see that the bishop is also capable of forks. White was down material and would probably end up losing the game, however, black has blundered and has allowed white to fork the king and rook. Black must defend the check and white will capture the rook. This will then be a draw by insufficient material. White has successfully fought off a loss.

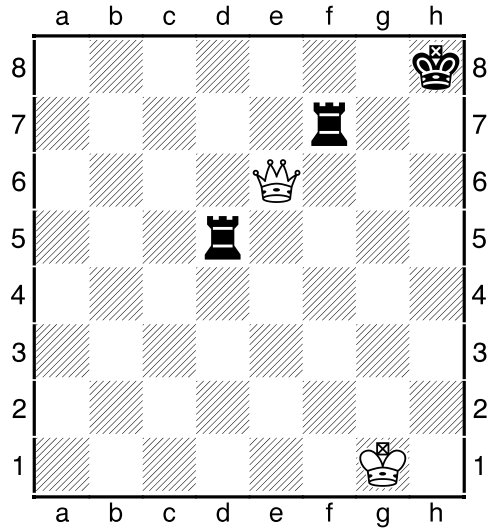


Forking Bishop and f7



Bishop Fork

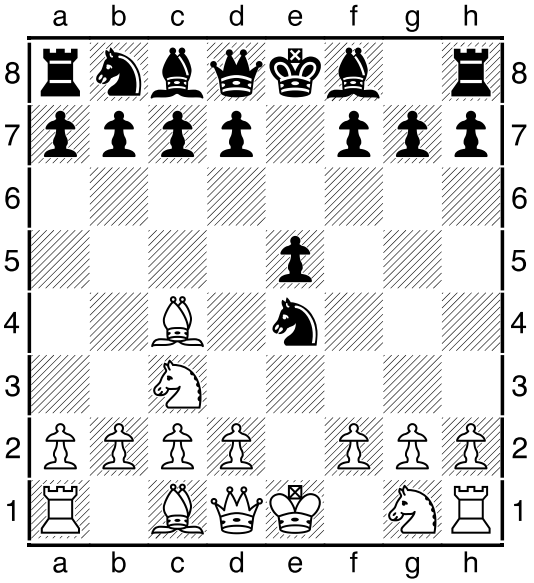
Of course, Rooks, Queens and kings are also capable of issuing forks. Below, we see that the white queen has forked both of black's rooks. Of course, this is a weak fork because black can defend by moving either rook to d7 or f5, thereby protecting the other rook. We must be careful when forking to be sure that the fork does not result in a strong defense. Keep in mind that black can also defend by checking the white king. Look carefully and consider the following sequence: 1. ... Rg5+, 2. Kh2 Rh7+, 3. Qh3 (forced) Rxh3, 4. Kxh3. Black now has a king and a rook against white's lone king.



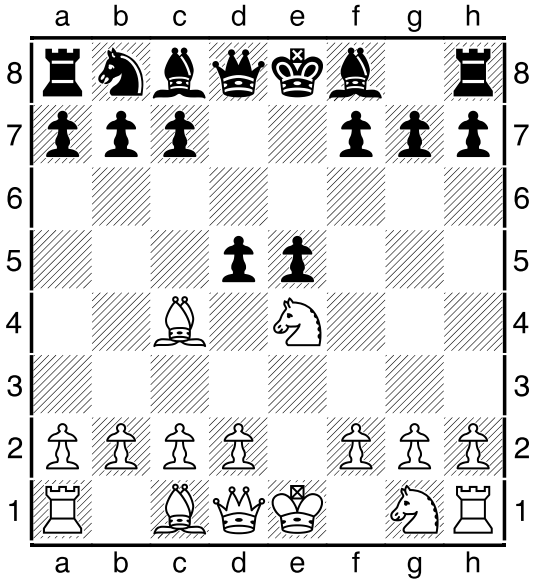
Good fork???

YOUR ARSENAL: FORKS

Below, we see what is commonly referred to as the "fork trick." After white's first three moves, Black has a few options. At first, Black capturing on e4 looks bad because the knight can then be taken immediately. However, if white recaptures with his own knight, black has the retort of d5 forking the bishop and knight. White will defend one of the two pieces and lose the other.



1. e4 e5
2. Bc4 Nf6
3. Nc3 Nxe4



4. Nxe4 d5

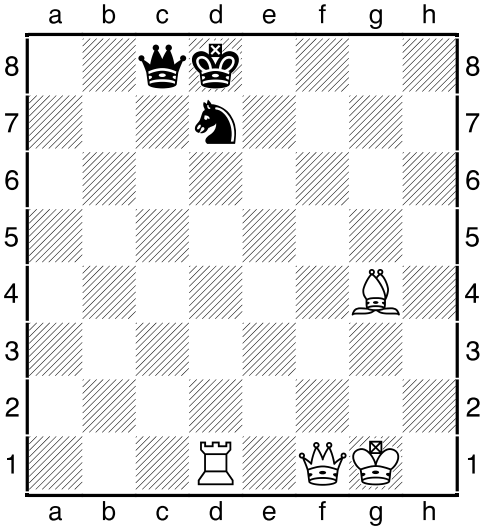
Again, there is much more to this position, but we can learn the lesson. Here, black can maintain material equality by anticipating a fork. The fork as a threat is quite effective because, if an opponent doesn't see it coming, you've gained material advantage. If your opponent does see the fork, he will have to defend against it somehow. So don't just think of a fork as a clever weapon, think of it as a strong threat as well.

Forks are one of the main tactics in chess, there is much more to learn about them, but for now, start looking for forks that will gain you a material, time, or positional advantage over your opponent. Your ability to use forks, threaten forks, set up for possible forks, and defend against forks will be key in your strategic advances.

YOUR ARSENAL: PINS & SKEWERS

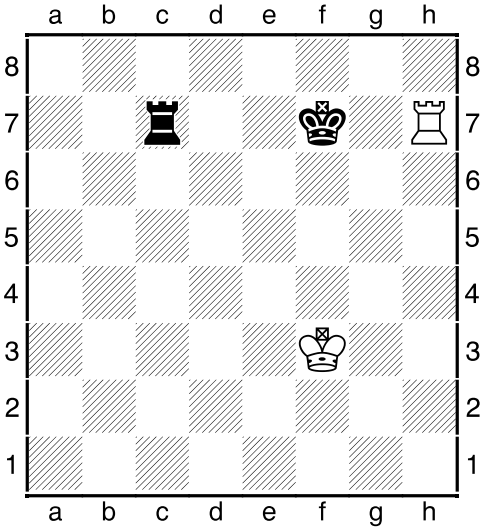
There are two tactics in Chess which are very similar, so we will examine them together; they are called pins and skewers. A pin is when a piece of lesser value is "pinned" to a piece of greater value. Skewers are the opposite of pins. A skewer is when a piece of greater value is attacked, exposing a piece of lesser value behind.

In the first example, the black knight at d7 is pinned twice. The knight is pinned to the Queen because, if the knight moves, the white bishop at g4 can capture the black queen. The most powerful type of pin is when a piece is pinned against the enemy king. For example, the black knight is also pinned against the king because, if it moves, it will expose the king to check by white's rook on d1. Pins are effective because they can completely eliminate a piece's influence, more on that idea in a moment.



Pinned knight

In the example of a skewer, the white rook has skewered the king by issuing check. The king must move out of the way, thereby exposing the black rook to capture. Skewers are often very effective in capturing material in the endgame.

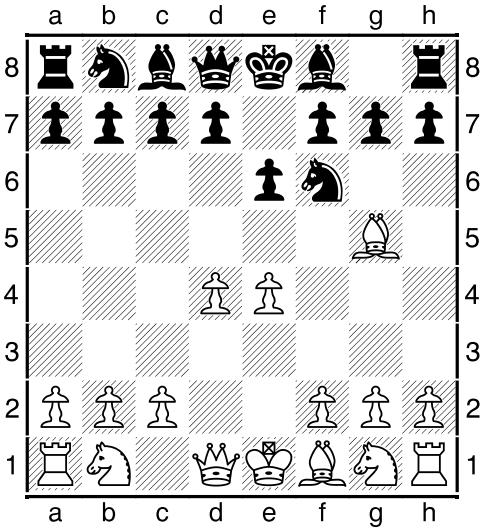


Skewered Rook

YOUR ARSENAL: PINS & SKEWERS

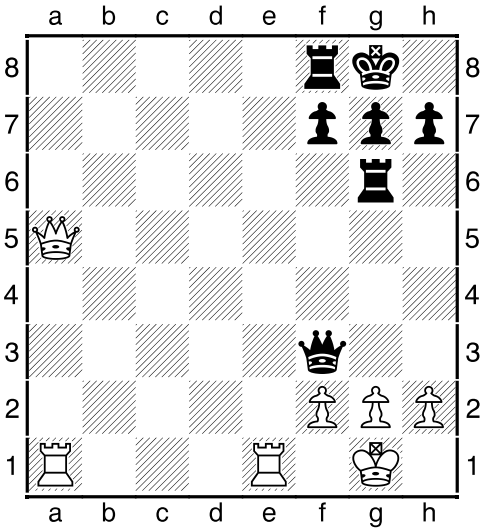
Pins

Let's turn our attention back to pins and study them in a little more detail. A pin is primarily effective because it removes options from your opponent. In the first example below, we see after (1. e4 e6 2. d4 Nf6 3. Bg5), white has indirectly defended the king pawn at e4. After black brought out the knight to attack the e4 pawn, white can defend several ways. One way is to directly defend the pawn by moving Nc3, however, that exposes the knight to its own pin by black's move Bb4. White has several options, but we see here how the knight is pinned against the Queen. It would be most undesirable to capture the e4 pawn (Nxe4) because black would lose his queen (Bxd8). In order to take the bishop, the black king would sacrifice the right to castle. The key lesson here is that a pin is effective because it attacks a piece, and it reduces its target's influence.



Early pinned knight

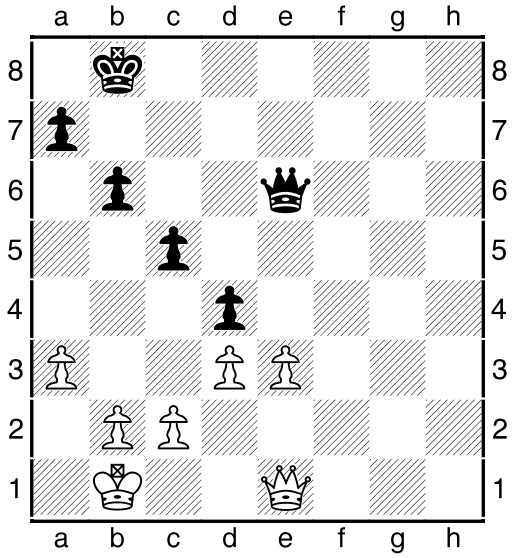
In the next example, we see a common type of pin. Black's queen seems to be easily captured by white's g-pawn, however, that pawn cannot capture because it is pinned by black's rook at g6. At this point, there is very little white can do to save the game. This type of pawn pin is especially effective in endgames because, if we see them, we can maneuver our pieces into positions that would otherwise be unavailable.



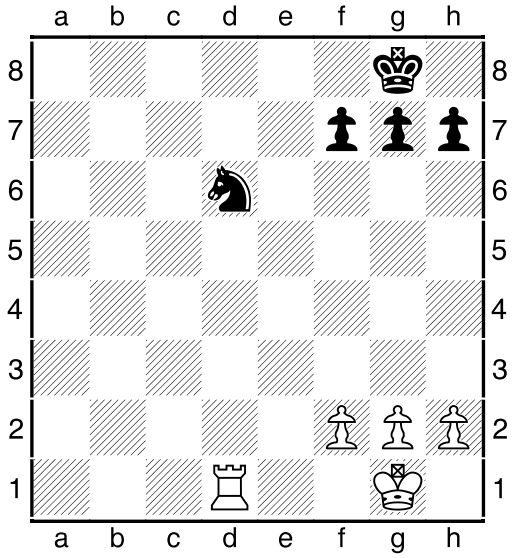
Pawn pin

YOUR ARSENAL: PINS & SKEWERS

Another common type of pin is the piece pin. In the Queen example below, white would like to capture black's d4 pawn with his e3 pawn. However, this would expose the white queen to capture by the black queen. Pins can also attack squares, much like forks. In the example below, we see that the black knight is pinned to square d8 because, if the knight moves, the rook will issue checkmate by Rd8++.

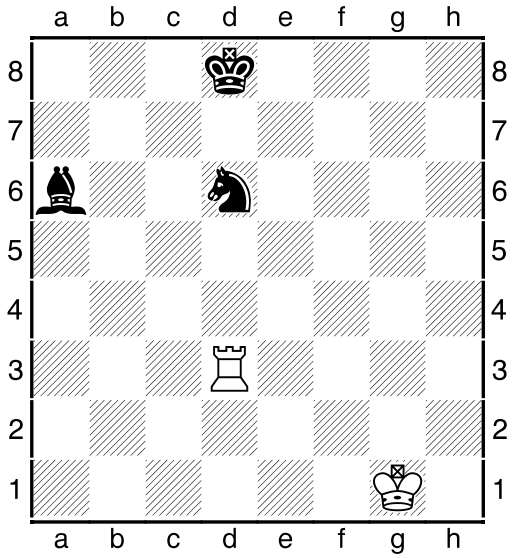


Pinned, Piece

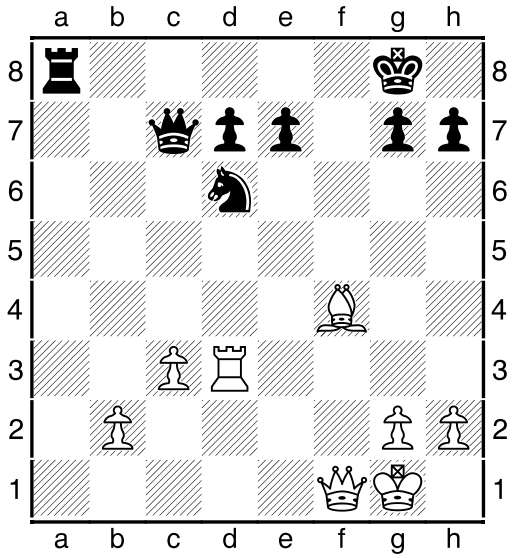


Pinned, square

On the defensive hand, there are four ways to get out of a pin. Should you find one of your pieces pinned: 1) take the pinning piece, 2) attack the pinning piece, 3) block the pin with a less valuable piece, or 4) move the piece of greater value out of the way. In example #1, we see that black can simply capture the rook to release the pinned knight. In the next example, we see that black has several options to release the pinned knight. Black can attack the white bishop (Rf8), block the pin with a pawn (e5), or move the Queen away, thereby releasing the knight (perhaps Qb6+). Be on the lookout for your opponent's options for defending before deciding on pinning his piece.



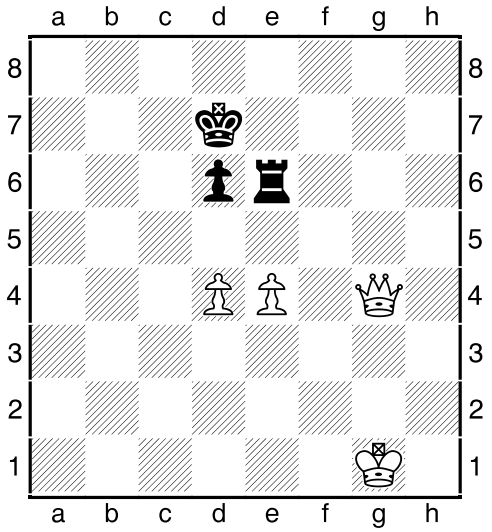
Pin Defense #1

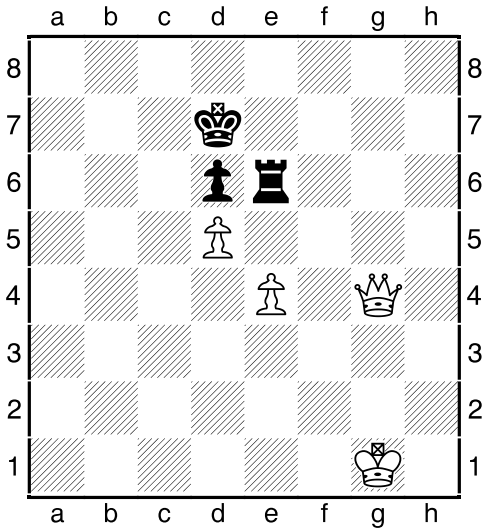


Pin Defense #2, #3, #4

YOUR ARSENAL: PINS & SKEWERS

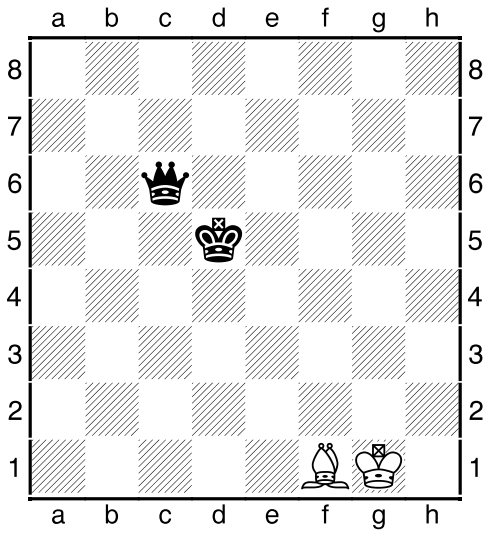
When you pin a piece, it is important to capitalize on your opportunity to gain an advantage. Very briefly, I'd like to introduce the idea of attacking a pinned piece twice. Whenever possible, it's a good idea to attack a pinned piece twice so that it doesn't get away. In the diagram, we see the black knight is pinned against the king. If black moves first the king can move away, releasing the rook. Perhaps he will move to e7 which breaks the pin while still protecting the rook. However, if white is to move first, it's obviously not a good idea to capture the rook (Qxe6) because the king will then take the queen. However, if white uses this chance to double attack the rook, d5, then it doesn't matter what black does, the rook will fall to white's hands. This is a very brief introduction to utilizing pins, but take the lesson and practice, practice, practice...

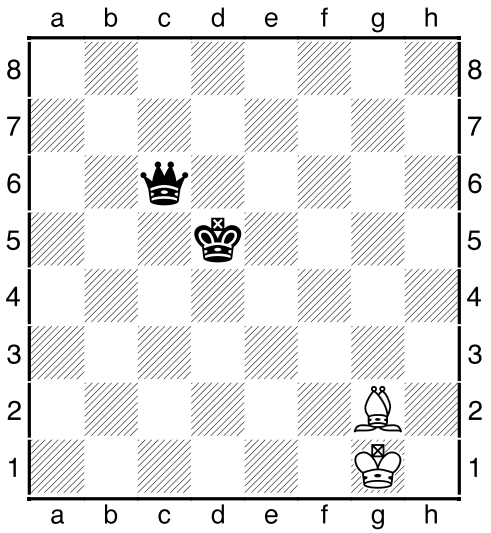




Skewers

We will only examine skewers briefly since they are so similar to pins. In a pin, the more valuable piece is behind the attacked piece. A skewer is just the opposite; the more valuable piece lies in front of the desired capture. In the example below, white is short on material and is facing defeat. However, a skewer quickly draws the game, Bg2. This checks the black king, forcing him out of the way so that the bishop can capture the queen. Black will recapture the bishop, and the game will be a draw.



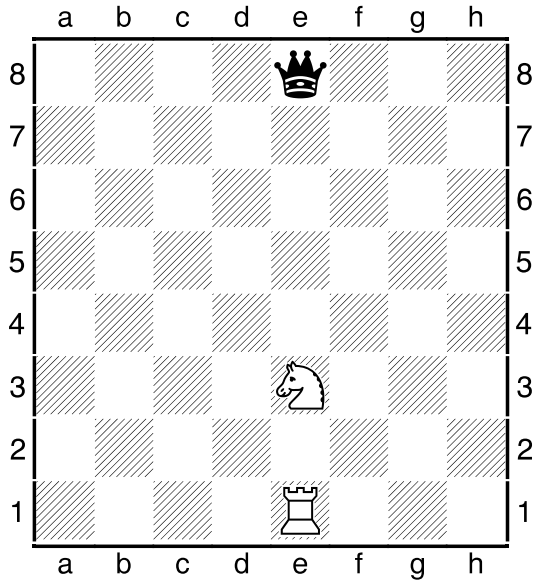


Pins and skewers, when used appropriately can be great attacks, look for opportunities to use them, and defend mightily against them!

YOUR ARSENAL: DISCOVERED ATTACKS

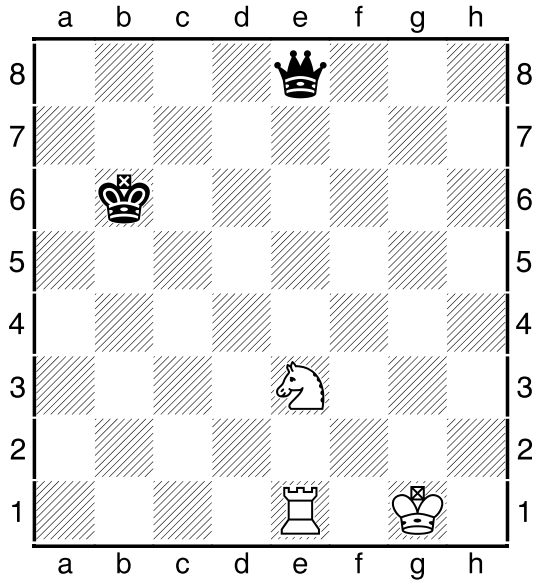
A "Discovered Attack" is when a piece is moved, thereby opening a line of attack from another piece. Discovered Attacks, like pins, skewers, and forks, are one of your main attacking tactics.

In the example below, if the knight on e3 moves to any other square, it will have opened a discovered attack on the black queen by the white rook. Notice that, depending on the knight's choice of movements, this may not be a great attack because the queen will also be attacking the rook. However, if the knight moves to either g2 or c2, it will have opened a discovered attack while also protecting the rook.



Discovered Attack

Using the same diagram with kings added, we can see just how effective discovered attacks can be. Below, if the white knight chooses to move Nc4+, Black will have to defend the check, and the rook will take the queen.

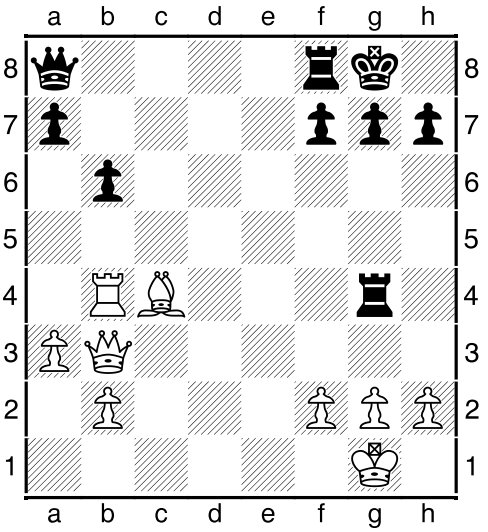


... with kings

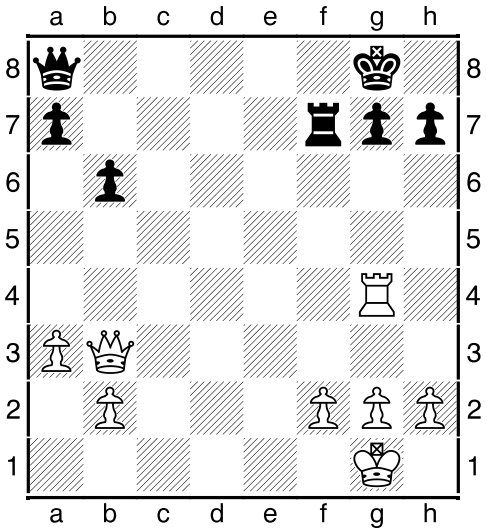
There's not much else to discovered attacks, but it may benefit us to look at some specific situations in order to see how discovered attacks can be effective.

YOUR ARSENAL: DISCOVERED ATTACKS

In this example (#1), we can see a close position. At first glance, black is menacing checkmate (Qxg2++), and black has a material advantage (two rooks versus white's rook and bishop). However, if white is to move, white has an advantage. Consider white's move Bxf7+. White would have to defend the check, probably ...Rxf7, then white would be allowed to capture black's g4-rook, Rxg4 (#2). This would give white a slight material advantage by exchanging the bishop for a pawn and a rook. Moreover, black's rook at f7 would still be pinned by the queen. White has drastically improved his game.

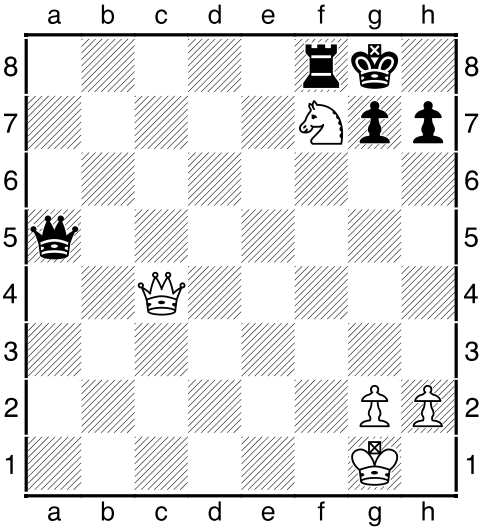


#1

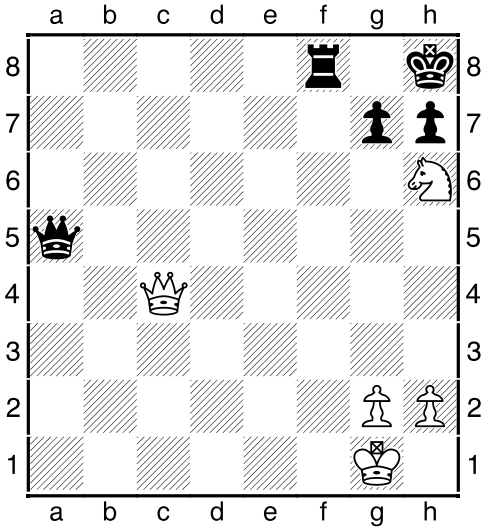


#2

Now, let's revisit an interesting example. Below, black has a decisive material advantage. If black is to move first, perhaps Rxf7, white will lose. However, White to move issues a discovered attack and force mate in 3 moves. After 1. Nh6+, how must black respond? Because there is both a discovered check and a Knight check, black must move Kh8. The key is the discovered check. Without the Queen on this diagonal, black could take the knight at h6. Now, consider white's follow through... [1. Nh6+, Kh8 2. Qg8+, Rxg8 3. Nf7++] This clever use of discovered and forced moves issues the infamous smothered mate, just in time to save white.



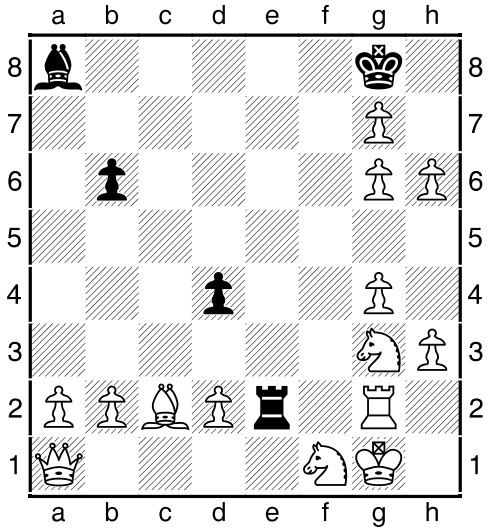
White to move, what now?



White to move and win...

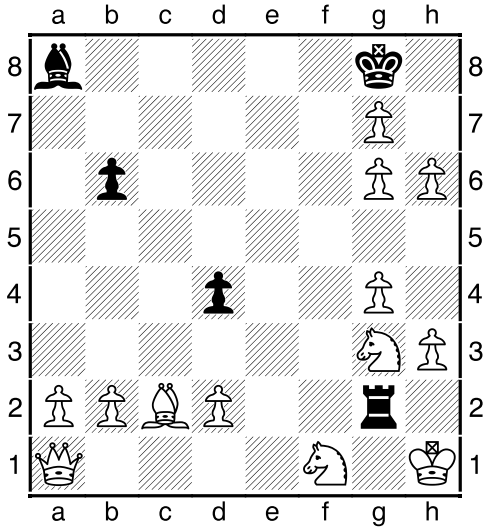
YOUR ARSENAL: DISCOVERED ATTACKS

Now let's turn our attention to a seemingly more complicated problem. Below, White has a large material advantage, and black doesn't have forced mate. However, black to move reveals a huge black advantage. Take your time, try to keep white in the box and take as much material as possible without letting him out of the box. What is black's best move? *Don't look ahead until you see the pattern.* Black will certainly not win the game outright, but will take enough material off the board because of his dominating position. Do you see how?



Black to move...

If you found it, you saw rook takes rook with check. White has one response, Kh1 (see below). Now anywhere the rook moves, the black bishop will issue discovered check, so the rook is free to move wherever he wants, but where? Look at the next diagram to help you decide. If the rook takes d2, white can still block the check with his g3 knight by moving Ne4. It's imperative that black continue issuing checks in order to take capitalize on his advantages. So what to take next? Try Rxg3+. Now white's only option is Kh2. The rook returns to g2 to issue check. Continue this pattern as long as possible leaving Rxa2 until all other possible pieces have been taken. This way, the final check will leave the rook to capture the Queen. Black will now have a decisive material advantage and will soon win. Look for patterns, and you will be successful.

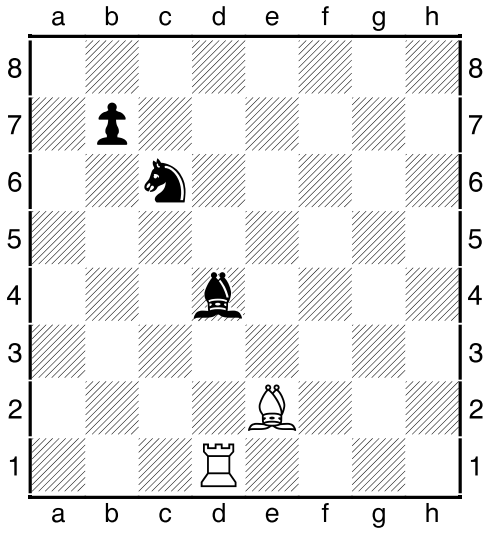


Black to continue and win

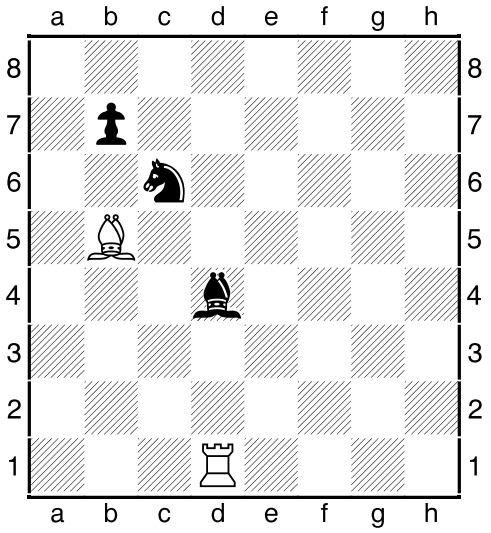
YOUR ARSENAL: REMOVING THE DEFENDER

Whenever we want to attack a piece, attack a square, or move our own pieces to a certain location, we may have difficulty because our opponent defends that place. Let's examine some ways of removing that defender.

The first way to remove a defender is to attack it. In diagram #1, we see the white rook at d1 attacking the black bishop at d4 while the black knight on c6 is defending. White can remove the knight by moving Bb5 (#2). Now black has the option to defend his knight or his bishop, but he cannot defend both. If the pieces remain, White will win by: bishop takes knight, pawn takes bishop, rook takes bishop.

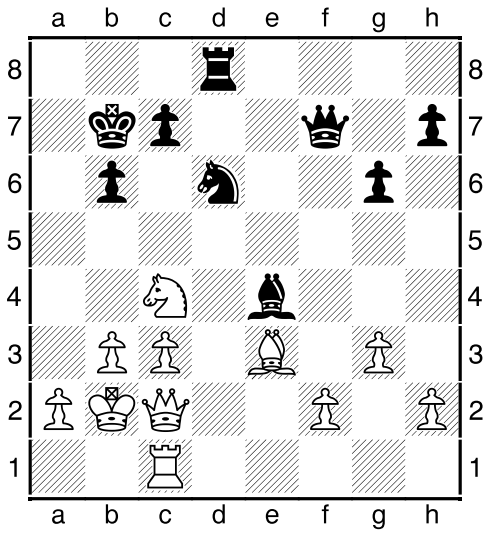


#1



#2

The second option is to remove the defender by capturing it. In diagram #3 below, we see that the black bishop is attacking the white queen and is defended by the black knight. How can white remove both threats with one move? Consider Nxd6+ (#4). Black will have to capture the knight to stop the check. No matter how he does so, the white queen will then be free to take the black bishop. Here, white trades a knight for a bishop and a knight by removing the defender of the attacking piece.



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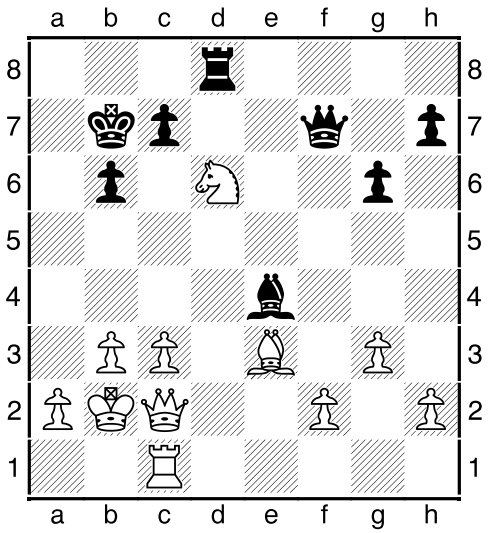
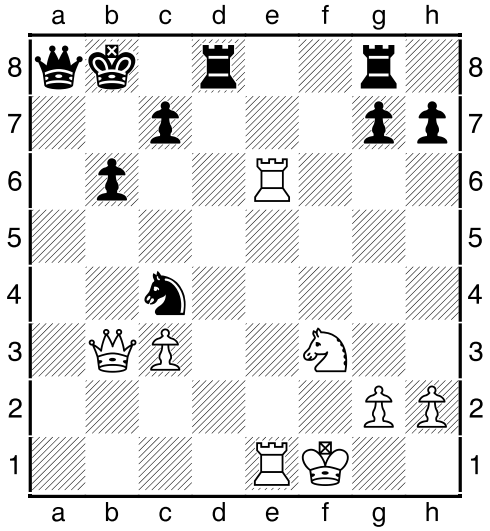


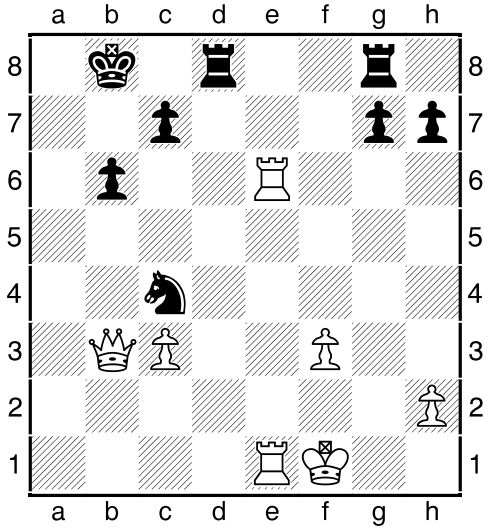
#4

YOUR ARSENAL: REMOVING THE DEFENDER

In the diagram below, black to move, what can black do to win material? You may notice the knight move Nd2 (forking the white king and queen), but the d2 square is defended by white's knight on f3. So how can we remove the defender of square d2?



Of course! Move a rook to attack the knight on f3. Well... White cannot move the knight since it will be pinned to the king, but then white has the chance to see the threat and move the queen; we've got to move more quickly. Try Qxf3+, sacrificing the Queen. This is really only a temporary sacrifice. After Qxf3+, White's only option is to capture black's queen, gxf3 (see below),



and now we can move Nd2 forking the white king and queen. Black has exchanged a queen to take a queen and a knight, not a bad move. Here we have seen that we can also work on removing defenders of squares, not just defenders of pieces.

Knowing how to attack pieces, defend your own pieces, and attack defended coordinates will help you progress in your understanding of chess and strategy!

SECTION 3: BEGINNER STRATEGY

➔ OPENING PRINCIPLES

- ► This section of the manual focuses on the guiding principles of the first moves of every chess game. These principles are fundamental to building a good strategic and tactical position for the middle and endgames. They should be learned and used not only for the opening but for the remainder of the game as well.

➔ POSITIONAL STRUCTURE

- ► This section of the manual explains pawn structure and how it determines the course chess games will take. It defines terms while briefly explaining how each type of pawn structure benefits and harms a player's game.

➔ THE ART OF TRADING

- ► This section of the manual focuses on the principles of trading. It explains the reasons why a player would want to trade and when. This has been touched on briefly in previous lessons, but the key principles are explained in detail here.

➔ FOR FURTHER STUDY…

- ► Having learned all the basic terms and concepts core to each and every chess game, a player can now begin developing his or her knowledge of true strategy. This section explains my final thoughts on what to do with what you've learned.

OPENINGS: BASIC OPENING CONCEPTS

The most complex point of any chess game is the beginning. Before either player moves any pieces, the possibility for attacks and defenses is infinite. As players move and capture pieces, the options become more and more limited, ending with a complete limitation of an opponent's options (to lose the king or lose the king... checkmate). Therefore, it stands to reason that you might want to have some help understanding how to decide your opening moves before you face an opponent.

To begin, the idea behind every opening in chess is to do three things: first, establish control of the board (usually in the center); second, develop all of your pieces onto the battlefield; and third, to protect your king. That's really the heart of beginning a game. Below, we'll look at some ideas that can help us accomplish these goals more effectively as we lead our armies into battle.

The study of chess openings is a well-written about topic with thousands of books written about the subject. There are specific combinations of moves which have specific names that well-studied players know and understand. Many players often learn a number of specific opening patterns and stick with them. This is because using similar openings will result in similar games since each opening will create certain positions which limit the type of play available after the opening sequence is completed. Learning specific opening "books" can be a helpful way to improve your game; however, for a beginner, we should start by looking at some general principles of openings. Some beginners try to memorize lines of attack in the early game, but this can lead to motorized thinking. This is disastrous to learning real chess. When we become locked into a certain pattern, our chess game devolves into the same moves game after game, and we will become jammed in our learning. Most of the written sequences are based on these principles anyway, so let's learn the rules and begin applying them to our game. The rules are:

1. Start with a center pawn *(because you want to control the center)*
2. Develop your knights before your bishops *(knights will take longer to develop)*
3. Try not to move the same piece twice in the opening *(development is key!)*
4. Castle early to protect your king *(king safety)*
5. Don't move your Queen out too early *(develop minor pieces first)*
6. Connect your rooks to allow movement *(they need to develop easily later on)*
7. Develop your attack only after you have mobilized your pieces
8. Capture towards the center.

The basic idea is this... Every move should try to do as many of the following as possible:

- **DEVELOP** another piece to a useful position
- **ATTACK** an enemy piece or square
- **DEFEND** a piece of yours that is under attack
- **PREVENT** your opponent from Developing, Attacking, or Defending
- **PREPARE** to develop, attack, defend, or prevent...

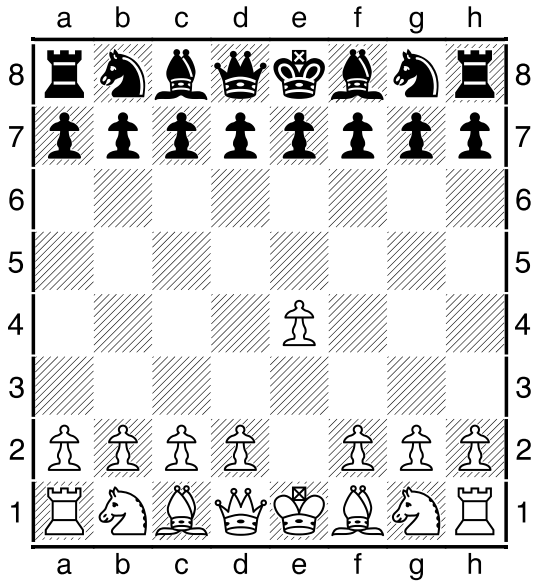
Before we look into these in more detail, remember, these are principles more than they are rules for operating. Sometimes, we will break these rules for strategic advantage. They are, however, good rules to follow as you learn the heart of the game. Now let's start looking at *why* each rule is a good one.

OPENINGS: BASIC OPENING CONCEPTS

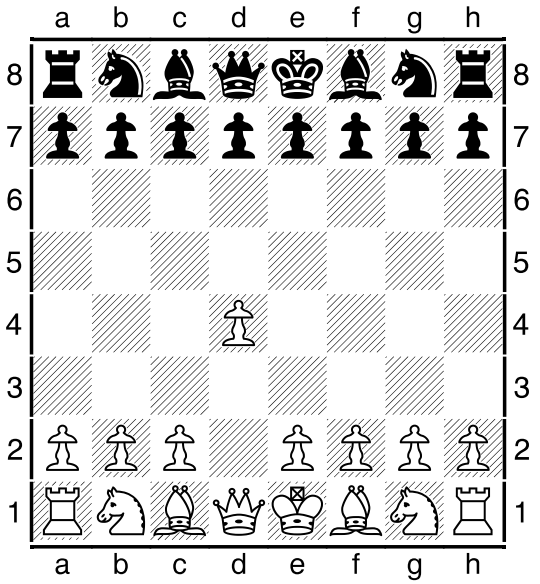
First, on your first move, it is a good idea to lead with a center pawn. As you learned early on, the center four squares are crucial to every game of chess. It stands to reason that you will want to take as control of the center as early as possible. In fact, the heart of most openings is all about controlling the center of the board as quickly and as efficiently as possible. Not only do we want our pieces to attack/defend the center, but, if we can manage it, we'd like to get our pieces to stand in the center, well-defended of course, as soon as possible. So, with all logic in mind, moving a center pawn to the center of the board not only places a pawn in the middle, but it influences another center square.

Looking below at the "King Pawn" example, you can see that, when we move our king pawn forward two squares, we have placed the pawn in the center, and that pawn influences d5, another center square. Moving the Queen pawn forward two squares also places a pawn in the center while influencing e5. The merits of each choice are many and complicated, but we can explore a couple here.

Most beginners are taught to start games by moving the king pawn forward two squares because it usually results in good learning experiences, but it has merits beyond that as well. Notice that, once this pawn has moved forward two squares, the king is still protected from diagonal attacks by the d- and f-pawns. Next, both the light-square bishop and queen now have avenues to move out from the rear rank. This is especially key for the bishop because it will allow us to castle sooner. So this single move opens lines for motion, does not weaken the king, and it exerts control over the center. All that for a first move isn't half bad!



King Pawn

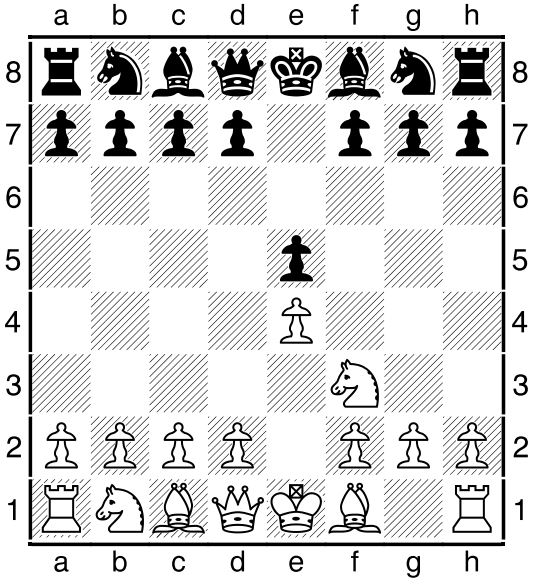


Queen Pawn

Moving the queen pawn forward two squares is pretty good, as well, but it requires more skill in the follow through than does the king pawn. It does open a diagonal for the dark-square bishop (a key to most queen pawn openings). However, it exposes the e1-a5 diagonal to attack which may allow your opponent to check your king early. Also, it will take an extra move to get the light-square bishop out to allow for the kingside castle. On the other hand, pushing the queen pawn forward discourages black from responding by moving his king pawn forward two. That's where this pawn's influence on the center can be seen. For now, just remember that starting with a center pawn will leave you the most good options for your following moves.

The second principle is to develop your knights before bishops. Bishops and knights often work together due to their unique qualities and equal value. Knights often support bishops and vice versa. However, knights have the special ability to jump over pieces giving them the ability to maneuver quickly in the opening of a game.

In the diagram below, we see that the knight has moved out after [1. e4 e5, 2. Nf3]. The knight has been developed, white is now only two moves from castling kingside, the bishop can still be moved out, AND white is attacking black's e5 pawn. Also, later on, white will have the option of moving the dark-square bishop to g5 and it will already be protected. This principle is bent often, but it is a good rule to follow while learning the heart of the game.



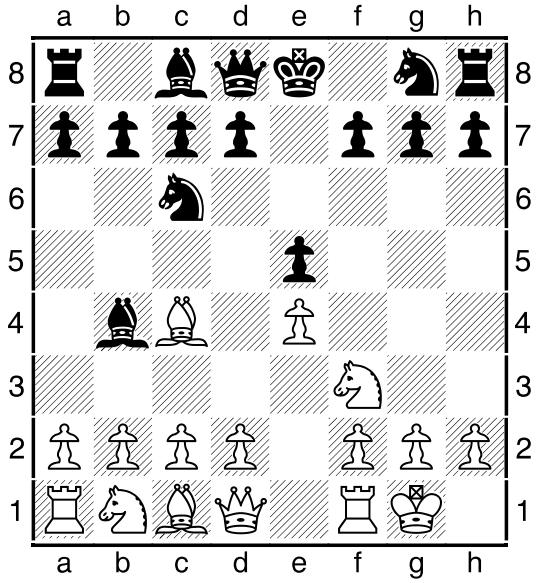
1. e4 e5
2. Nf3

The next principle we will examine is: try not to move the same piece twice in the opening. Remember that our goal in the opening is to develop all of our pieces towards the area of action (usually the center...). When we move a piece more than once, we may be wasting valuable opportunities to develop our pieces into the battlefield before our opponent.

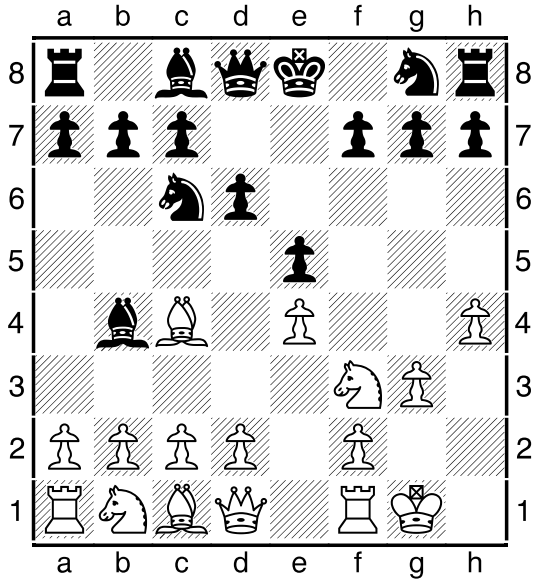
For example, looking at the diagram above, white could now move the f1-bishop to any square on its diagonal. This would allow white to castle. Perhaps then white could develop the b1-knight, then the d-pawn, then the c1-bishop, then the queen. In seven moves, white can develop all his pieces. Remember, black can do the same. However, if white moves the f1-bishop to c4 (a pretty good developing square), then moves it to b5, then back to a4, then to b3; white has used 4 moves and still only has two minor pieces developed. Look for more on this concept when we talk about not moving the queen out too early.

The fourth principle for openings is to castle early. This protects the king from unwanted and time-consuming checks. Every time a king is checked, you must defend, and you may have few options for defense.

In the first diagram below, we see that white and black have thus far followed principle. White's pieces are developed towards the center, and the king has castled. Notice the safety of the king. The f2, g2, and h2 pawns are all placed directly in font of the king, a very snug position. What should black's next move be? If he leaves his king in the center of the board, white may soon begin attacking it or threatening attack, and black will lose the power to decide his own moves.



Strong King Position



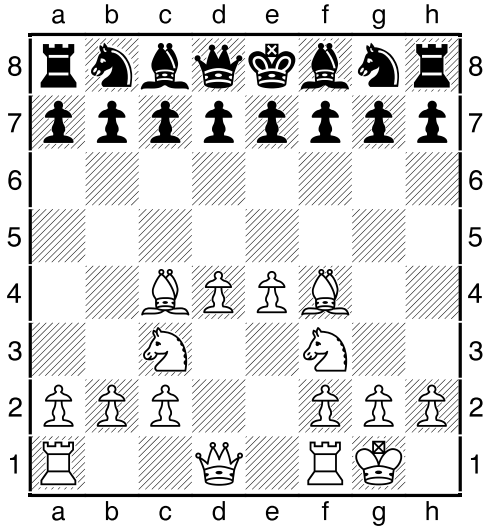
Weaker King Position

One final concept here is to not advance your pawns ahead of your king. Notice in the second diagram how the king pawns have opened up the castle. Look at how easily black's c8-bishop can now slip behind white's lines of defense, and white cannot stop it with pawns. White will have to use other pieces, perhaps risking the king further, to protect against the invading bishop. Black still has the option to castle to either side, and also notice how his pieces are more developed towards the center.

King safety is obviously an important part of the entire chess game, but we must focus on this early so that we can develop our other pieces without being forced into positions we didn't choose ourselves.

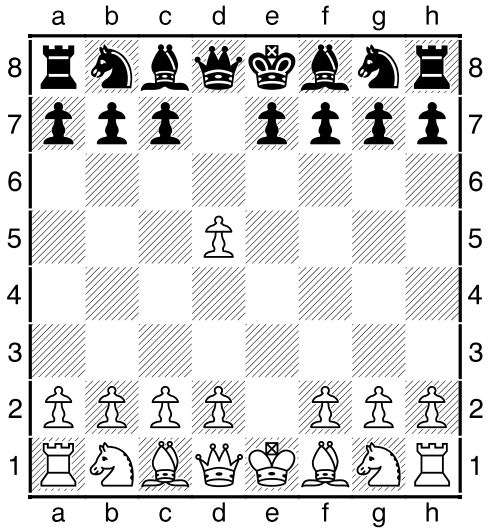
The next principle is: Don't move your Queen out too early. Usually in openings, the Queen offers protection to the other pieces as they develop. She is such a powerful piece that it would be foolish to bring her out too early and risk attack. If the queen is brought out early, she will probably be attacked forcing you to defend her and waste moves in order to do so.

Below, we see an ideal opening for white (if black never moves...) At this point, all of white's minor pieces are developed, white has established central control, and the white king has castled to safety. White can now bring the queen into play, but still as a supervisory piece. Perhaps move her to d2, thereby supporting the dark-square bishop and d-pawn while retaining the ability to guard or attack quickly.



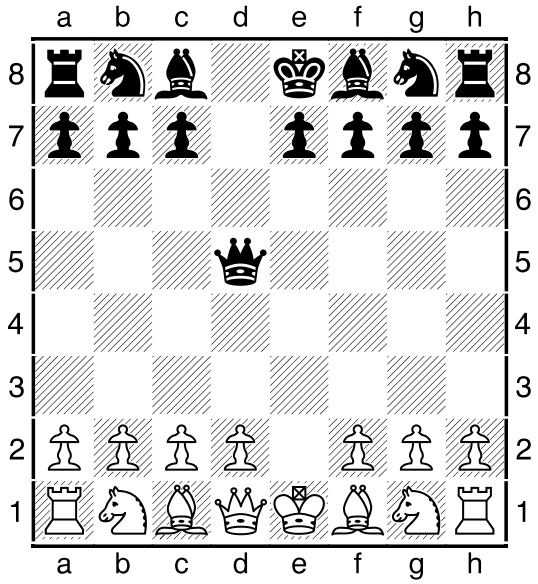
One ideal opening...

Let's examine how moving the queen out early hinders your opening. We'll look at a starting position and see how it develops, watch closely. Below, after 1. e4 d5, 2. exd5, black has many options for opening. If we follow principle, black should develop a knight to attack white's errant pawn. This would develop a piece and influence center squares. But what if black recaptures using the Queen?

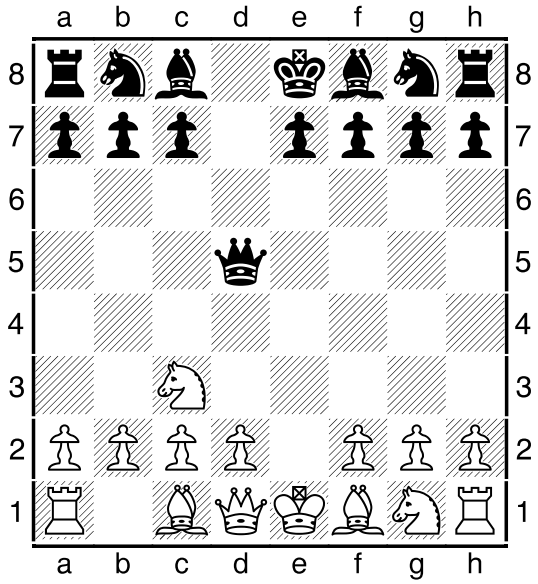


1. e4 d5
2. exd5...

Then we will have arrived at position #2 below. True, Black has influenced the center (in a powerful way). However, white can now chase the queen around the board while developing his own attack. How can white develop a piece while attacking the black queen, forcing black to defend? Try Nc3 (#3). Black now has to move the Queen a second time (breaking principle). Consequently, black will not be able to use this move to develop another piece, hampering black's development.

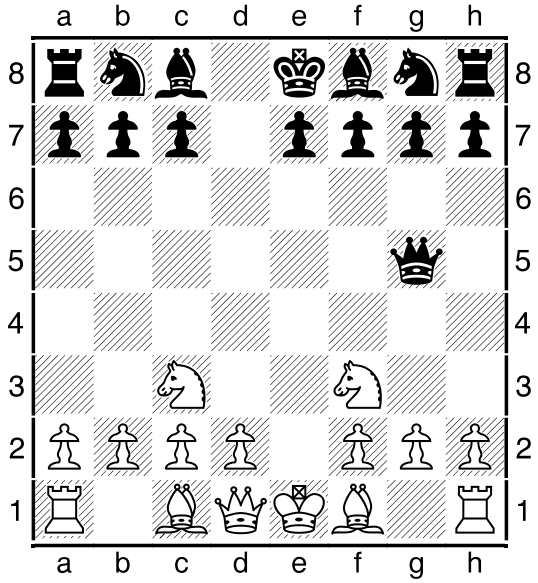


#2

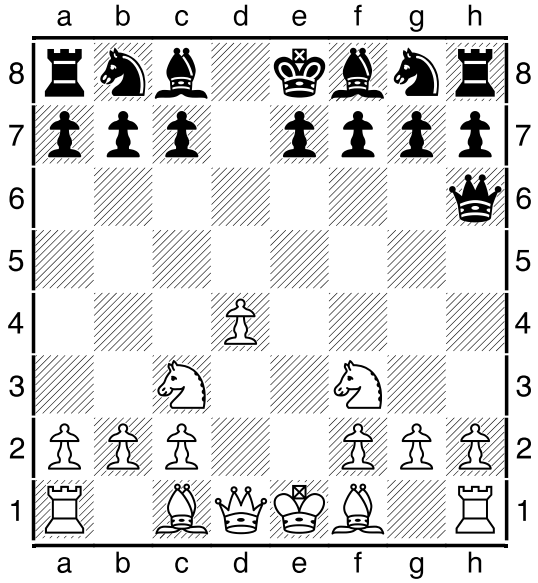


#3

So let's say that black moves the Queen to g5 to defend. White then plays Nf3, attacking the queen while developing another piece towards the center (#4). White now has two knights developed to black's single queen. Let's say black moves Qh6 to defend. White can then move a pawn to the center, d4, opening a discovered attack on the Queen from the c1 bishop (#5).

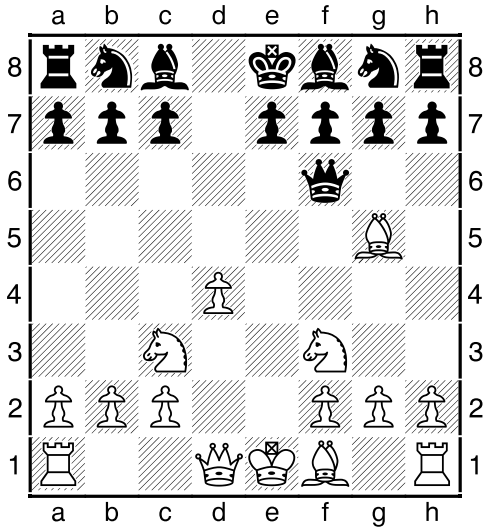


#4

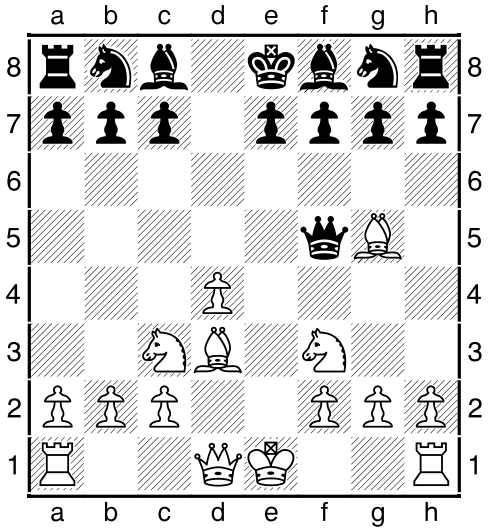


#5

Let's say black now plays Qf6 to defend again. How can white continue developing while chasing the queen? Try Bg5 (#6). Let's now say black defends by Qf5. We want to continue developing "with tempo." (with tempo means to make a move and gain a time advantage by forcing the opponent to move) How can we do this? We still haven't castled, how can we help this as well? Try Bd3 (#7). Notice how all of white's pieces are developing, and black has to keep moving his queen?

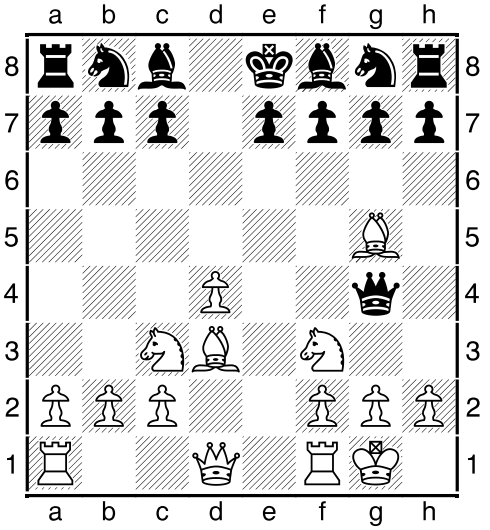


#6



#7

Let's say black now moves Qg4 attacking white's g2 pawn. This can be dangerous because we would be in danger of losing our rook with check if Qxg2. However, this is easily fixed by castling kingside (#8).

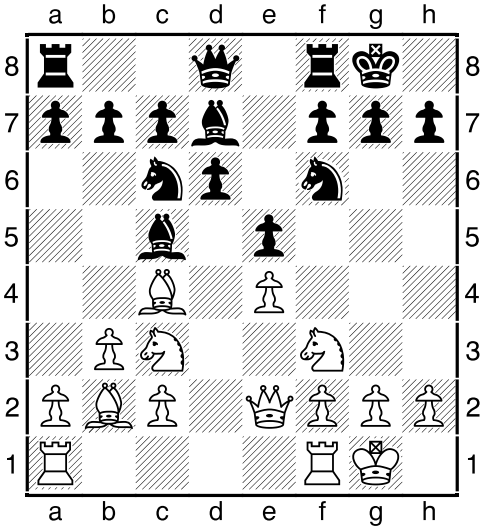


#8

Look at this position. Black brought the queen out early and has suffered dearly for his mistake. He has failed to develop any other pieces, failed to establish central control, and all the while, white has completely followed principles and has a HUGE advantage in development as a consequence. We could continue following this position, but it is almost a sure win for white. Remember, when you bring your queen out too early, she is then open for attack, and you will lose options for moving. When your opponent decides your moves for you, you fail to control the game, and you will lose...

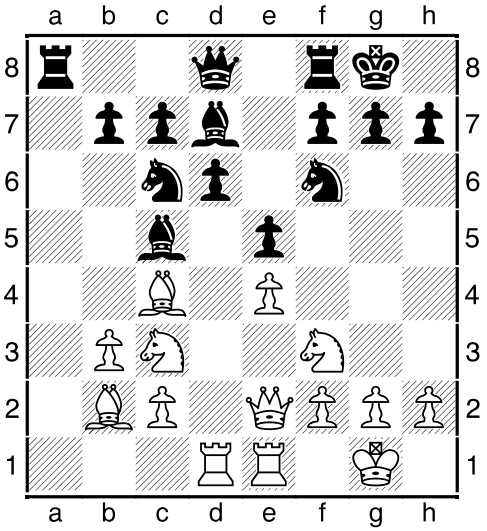
The final principle of openings is to connect your rooks. This means that you clear your pieces off the back rank allowing the rooks to support each other and allowing them to move freely to the right file. Our aim should be to move the rooks to either half-open or open files, or to central files.

Looking below, we see that white and black have been following sage opening advice, and white has finally moved the queen off the back rank. Both of white's rooks are now free to roam the back rank and find the best resting position, once the board position has been clarified. The rooks can move to e1 and d1 to support the center, or, if other files become open or half-open files, the rooks would want to move there. Meanwhile, the other rook defends and supports the rook.



Connected white rooks

Connecting the rooks is a good idea because the rooks act strongly as supporting pieces early, and often arise as attack pieces in the middle- and endgame. Briefly, a half-open file is one with a pawn of only one color on it, and an open file has no pawns on it. Rooks like these files because of their mobility. Below, we see white's d-rook is on a half-open file while black's a-rook is on an open file (more on this later...).



Well-Placed rooks

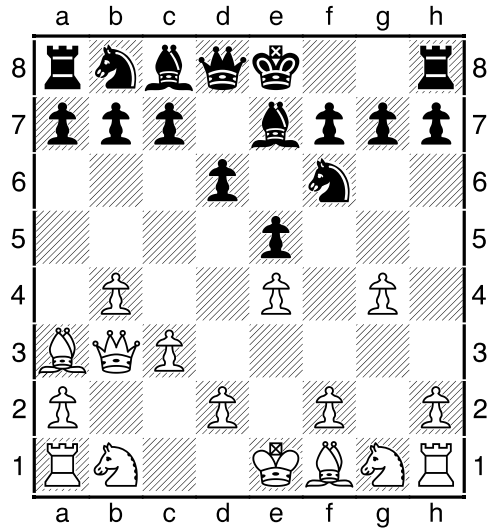
The last two principles will be dealt with only briefly, but they are included because they are good principles to work with. Not only should you consider them in your openings, but they are good general rules for the entire game.

First, only develop an attack after mobilizing all your pieces. Even without using a diagram to explain, this concept is pretty simple. Think of moving your queen out too early. Remember how black had to constantly defend and lost opportunities to develop? Well, when you go in for a long attack too soon, it may fall apart and you'll have to waste time pulling pieces back and defending the counter-moves. Meanwhile, your opponent, if he's smart, will continue developing pieces and may even develop his own attack that you won't have time to defend.

This is not to say that you shouldn't capture pieces in the opening. In fact, many openings involved a capture or two to open lines. Just remember not to attack too forcefully too early in the game. Doing so may extend your front line beyond your supply and defense lines. Whenever considering a long term attack, carefully consider the connection and mobility of your pieces, and be sure that your army can work together successfully.

Finally, capture towards the center. Remember, the center of the board is where your pieces are most effective. Capturing towards the center will move your pieces towards the center while exerting more influence on the center. That's why, as a general rule, it's safer to capture towards the center. Obviously, there are many times near the endgame that will warrant capturing in other directions, but, when in doubt, follow the rule.

Below, we see a simple examination of this principle. Which pawn should black's f6-knight capture, white's e4 or g4 pawn? Well, if we follow our principle, black should move Nxe4, capturing towards the center. White will now have to deal with a centralized black knight as well as the loss of his pawn (and the many other problems with the position).



Now that we've examined the guiding principles of beginning a chess game, you can lead each game with more careful consideration. Use the rules as best as you can, but, remember, don't get locked into any one way of thinking; that is your worst enemy!!

PAWN STRUCTURE: THE GOVERNING WALLS

You may have noticed the title of this lesson is "The Governing Walls." It seems odd to say that the weakest piece on the board "governs" anything, but pawns, used wisely, determine the strategy of every chess game. They may only be worth a single point, but we have 8 of them to start, making them (working together) about as powerful as a queen. Pawns are extremely important when deciding on moves and positions because structure determines the ability of other pieces to move around the board. To begin, we need to define some terms we will be using when discussing pawns.

Pawn Structure (or Pawn Skeleton)

We often refer to a term called the pawn structure of a position. Pawn structure is, quite simply, the entire layout of pawns on the board. The pawn structure influences all of the other pieces because the layout of pawns will determine where the other pieces can move.

Pawn Chains

A pawn chain is a line of pawns connected by the diagonal capture capability of the pawn. A pawn chain's strength depends upon the strength of the "base pawn" (the pawn at the beginning of the chain).

Pawn Islands

A pawn island is a group of pawns which reside on files next to each other. A file with no pawns on it separates the pawn islands. Generally, the fewer pawn islands you have, the stronger your pawn structure.

Isolated Pawns

An isolated pawn is one which cannot be defended by another pawn, meaning that there are no pawns on the files next to the isolated pawn. A pawn island of one pawn would be an isolated pawn.

Passed Pawns

A passed pawn is one which cannot be attacked by an enemy pawn either because the enemy has no pawns on the files next to it or because the enemy's pawns on the files next to it have already moved past it. A passed pawn can move towards promotion without being threatened by an enemy's pawns which makes it a serious threat. Generally speaking, passed pawns should be pushed up the board as quickly as possible because the closer to promotion they get, the more your enemy will have to do in order to prevent the pawn from promoting. A passed pawn on the fifth rank is said to be worth a bishop or knight, on the sixth rank worth a rook, and on the seventh rank (about to promote) worth a queen. A protected passed pawn is a passed pawn which is held and safe from attack.

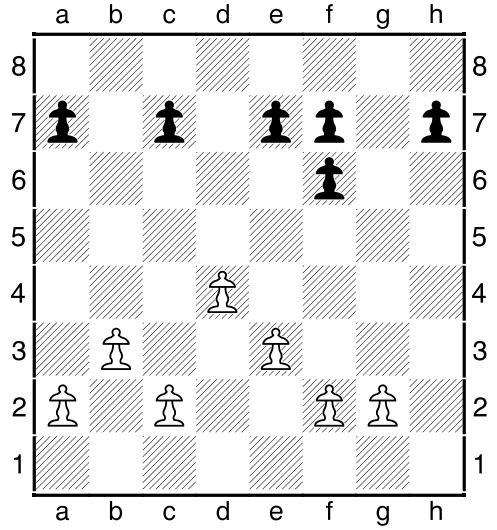
Doubled pawns

Doubled pawns are two pawns on the same file. This is generally a weakness because one pawn impedes another pawn's forward motion, but it's not always a weakness.

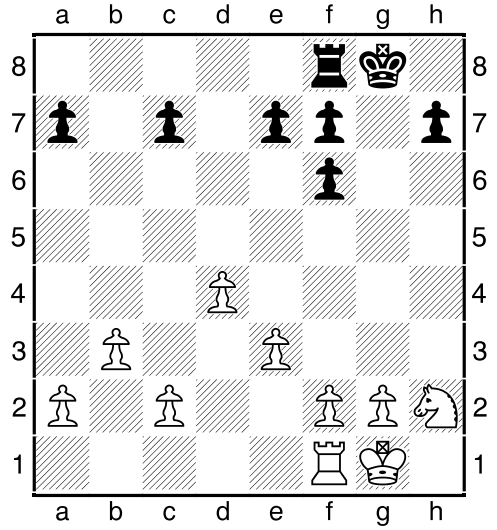
Now we'll turn our attention to some examples that will help us understand these definitions as well as the strengths and weaknesses of each.

PAWN STRUCTURE: THE GOVERNING WALLS

From the position below, we can notice many things. First, black's f-pawns are doubled. Also, black has four pawn islands: the a-pawn, the c-pawn, the e- and f-pawns, and the h-pawn. White, on the other hand, has a single pawn island stretching from the a-file to the g-file. You may think these are separate because the c-pawn and d-pawn are not touching as the others are, but we need to see that they can connect because they are on touching files. Also, white has a pretty good pawn chain in the center (f2, e3, d4).



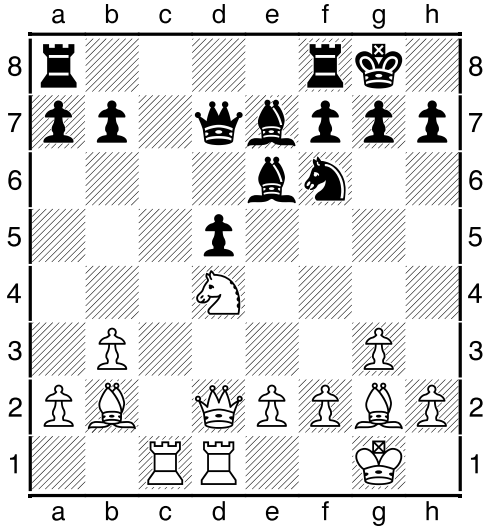
Now, let's consider the same pawn structure with a few more pieces...



Above, you see how black's doubled pawns can easily become a liability. The white knight can slip onto black territory and attack the king (Ng4, Nh6+). Doubled pawns are not always a terrible thing, but we are simply covering the terms here, not all the strategy. For the future, watch the ways that doubled pawns complicate games and only choose to double your pawns when absolutely necessary for strategic advantage.

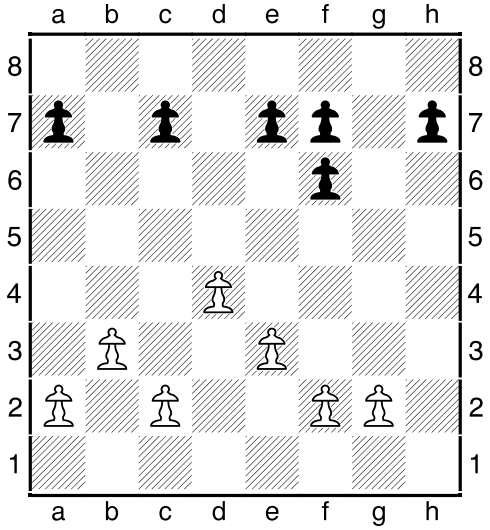
PAWN STRUCTURE: THE GOVERNING WALLS

In the above diagrams, we briefly pointed out the weak isolated pawns. They are weak because they cannot be defended by other pawns. Below, we see a typical position where black has an isolated d5-pawn. White, on the other hand has a knight posted at d4. d4 is an outpost because it cannot be attacked by black's pawns, and it will remain an important part of white's game. The isolated d5 pawn will be a long-term weakness for black as well. If you find yourself with this kind of isolated central pawn while there are still many pieces on the board, your best idea is to play actively, forcing your opponent to play to your moves instead of taking advantage of that weakness.



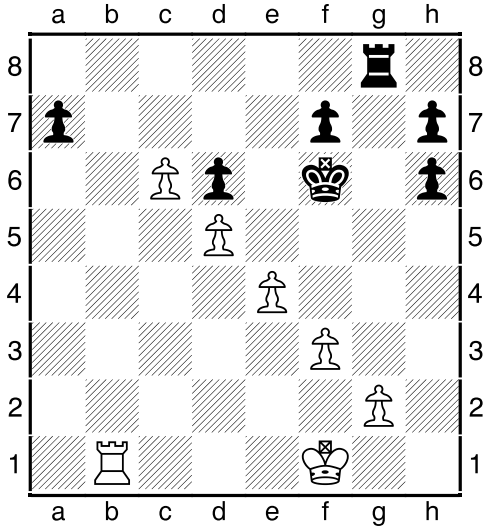
Isolated d5-pawn

Back to the main diagram below, we must consider the pawn islands. If we were to add only kings, white's fewer pawn islands would mean that his pawns will be more able to connect and act in a coordinated way. When calculating endgames, generally, the more pawn islands a player has, the more weakness he has. This is because, for example, black's a, c-, and h-pawns cannot work with any other pawns and will therefore leave more holes for white to manipulate.



PAWN STRUCTURE: THE GOVERNING WALLS

In the diagram below, we see another example of a pawn chain. The material is even, but white's position is vastly stronger because of the massive pawn chain stretching from g2 to c6. White's only weakness is the base pawn of the pawn chain, the g2-pawn. That pawn is protected by the king. On the other hand, black has weakness all over the place. This is how pawn chains can be powerful.



One other thing to notice in the position above is the passed pawns. A passed pawn is one which has no enemy pawns in its path to promotion. Black has a passed pawn on the a-file, and white has a passed pawn on the c-file. The main difference is that black's passed pawn is isolated and can be easily attacked. White's passed pawn is called a "protected passed pawn."

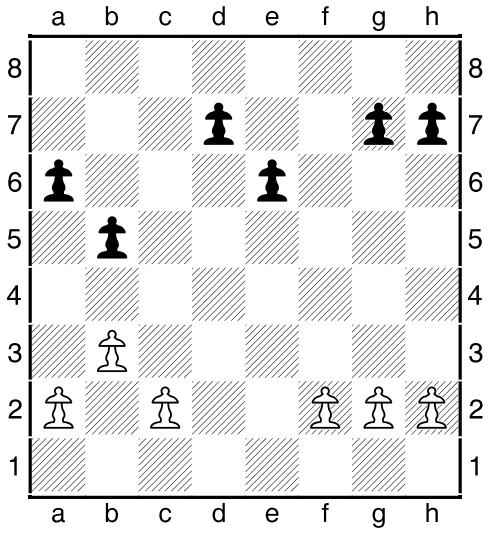
Passed pawns need to be pushed up the board to threaten promotion, forcing your opponent to defend against your possible massive increase in material. That's why a passed pawn is good, but a protected passed pawn is better. Here, white should attack black's passed pawn (maybe Ra1), and then white should look to advance his passed pawn. One thing to remember about rooks and passed pawns is that a rook belongs *behind* a passed pawn not in front of it. If your rook ends up in front of a pawn trying to promote, it will become complicated, and chances are you'll be forced to abandon the pawn. Passed pawns are critical in any position because they represent a large threat (the threat of gaining material), and we must consider them when weighing choices for motion.

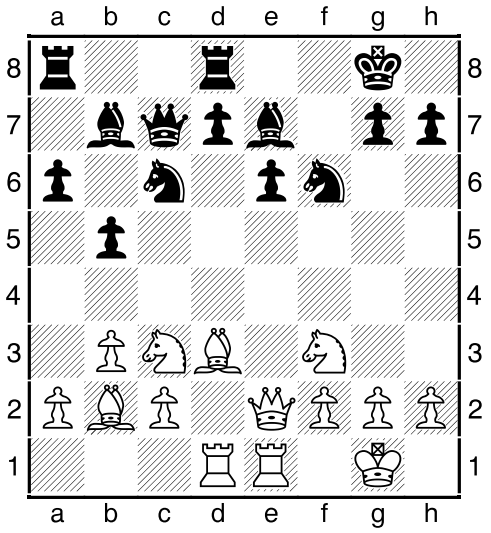
One key thing to remember is that a pawn "weakness" (isolated pawn, doubled pawn) is only a weakness if 1) it can be attacked or 2) you can't eliminate it. For example, an isolated pawn out of reach to your opponent is not really that much of a weakness. As another example, doubled pawns are only a weakness if they remain doubled. Trading off one of the pawns or un-doubling them removes the weakness, so the weakness was only temporary.

As we've seen, pawns set the structure of positions, and they are much more complicated than you may have previously considered. Now that you know the terms used and some of the basic strategy related to pawns, you need to turn your attention to the types of positions that different pawn structures create.

PLAYING THE POSITION: OPEN AND CLOSED GAMES

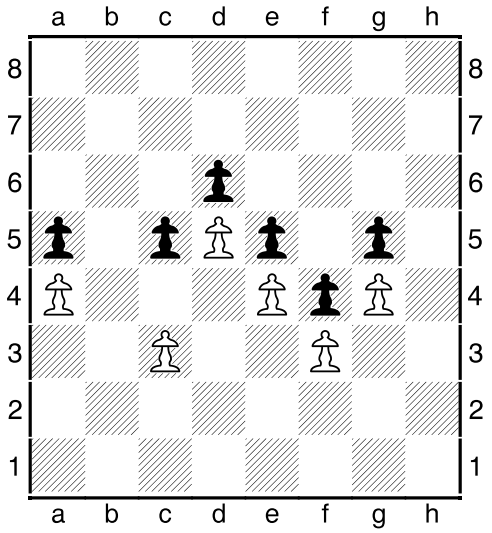
You've seen how pawns affect the structure of the game, now its time to look at two main types of games called Open and Closed games. An open game is one where the pawn structure has lots of gaps and has potential to change without being locked down. Below is a good example. Many diagonals and files are open, and pieces have a lot of potential for motion. A general rule is that bishops are stronger than knights in open games because bishops are able to move quickly through the open pawns while knights are limited by their L-shaped motion. The reverse is true, as well. Knights tend to be better than bishops in closed games because of their ability to jump over pieces.

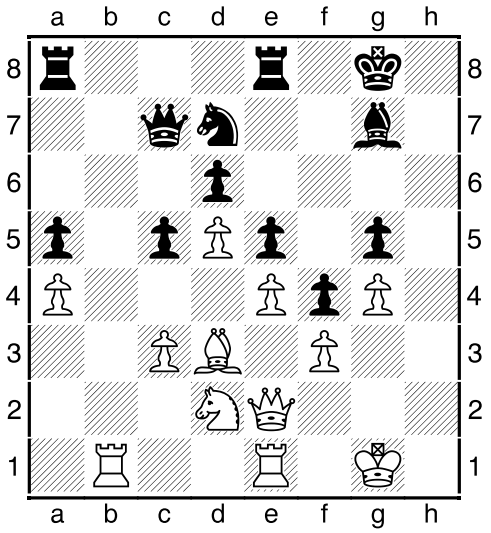




Open Game

Below, we see an example of a closed game. The pawns in the center are locked together, blocking center files and many diagonals. However, the h- and b-files are open, allowing possible attacks. These are simple definitions, now let's look at how this understanding will help us evaluate positions and make decisions.



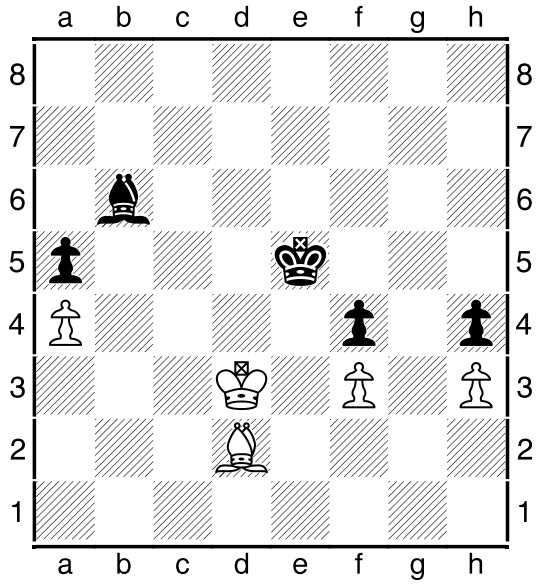


Closed Game

PLAYING THE POSITION: OPEN AND CLOSED GAMES

We evaluate positions and piece value based on these types of games. As stated before, bishops tend to be more valuable than knights in open games while knights tend to be more powerful in closed games. Here are some general rules which will guide your understanding... First, a bishop tends to be good if its fixed or immobile pawns are on squares of the opposite color so that its own pieces don't block its motion. It also helps a bishop's value if the opponents fixed or immobile pawns are on squares of its own color because they can then become targets for attack.

Look at the position below. Both players have dark-square bishops. Black's bishop is blocked in by its own pawns. Its motion is limited by black's own pawns. Meanwhile, all of white's fixed pawns are on light squares. White's pawns are not blocking its bishop's movement at all. Also, because black's pawns are on the same color squares as white's bishop, white now has targets to aim at. White's bishop can attack while black's bishop is relegated to dancing around the board waiting for something to do.



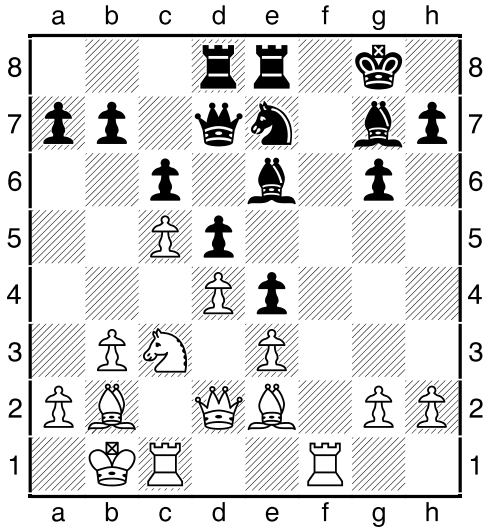
Good and Bad Bishops

So here, we can see how a bad bishop can be a rather useless piece while a good bishop dominates the board and play.

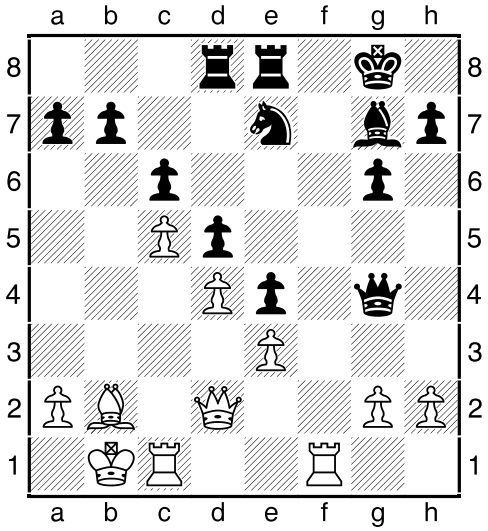
PLAYING THE POSITION: OPEN AND CLOSED GAMES

Below is a quick example of how to trade in order to improve your position using pawn structure as a guide. Looking at the first diagram, what can black do to improve his position. Look for a way to trade off an inactive piece to remove white's more active piece. There are many elements in this position, but, keeping with the theme of pawn structure, open and closed games, and good vs. bad bishops, the answer should be fairly obvious.

On what color squares do most of black's pawns reside? Where do white's pawns reside? Which of black's bishops is considered a bad bishop based on the pawns? Which of white's bishops will be considered a bad bishop and which a good bishop? How can black trade his bad bishop for white's good bishop?



Black to move



Strategically trading...

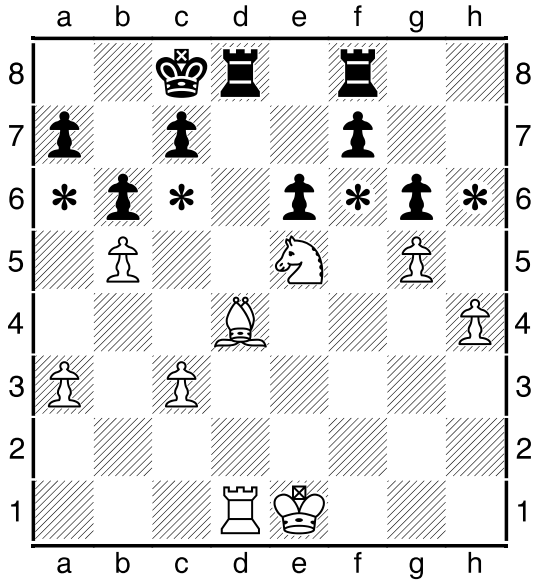
Try moving black's light square bishop to g4 (1. ... Bg4, 2. Bxh4 Qxh4). Look at how the position has changed. The pawns are all the same, but black has eliminated a fairly useless piece in order to gain white's fairly useful piece. The black queen still dominates the light-square diagonals, and black now has a good bishop to work with and white has a bad bishop to work around.

To wrap up, looking at pawn structure can help you determine the relative strength of knights and bishops on the board. Knights tend to be more useful in closed games because they can maneuver around the locked pawns while bishops are blockaded by them. In open games, bishops tend to be better than knights because they can move quickly around the board and are not slow like the knights who move in an awkward L shape. When comparing bishops, a good bishop is one that has lots of targets without being blocked by its own pawns. A bad bishop is one that is blockaded by its own pawns and has no targets to attack. Understanding these things is critical to knowing what to trade and when to trade. Should you trade a bad bishop to remove an opponent's good bishop? Should you sacrifice all your knights in a closed game? Knowing these principles should help guide your strategic thinking.

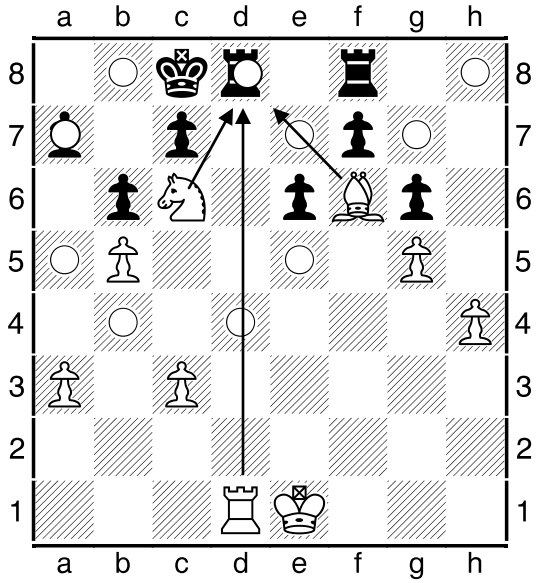
OUTPOSTS: UTILIZING WEAK SQUARES

Finally, when evaluating positions, we must be aware of weak squares and outposts. A weak square is one which has weakened pawn defenses. Once pawns on both sides of this square have advanced or been captured, the square is a hole. However, even when only one of the pawns has advanced, that square has been weakened. Next, an outpost is a weak square or hole in or near your opponent's territory which can be defended by at least one of your pawns. Your goal should be to occupy those outposts with pieces which are less valuable than any of the pieces your opponent could use to capture the outpost.

That's kind of a very wordy way to explain outposts. Outposts are weaknesses to because they are squares that can no longer be defended by pawns, and they are defended by your pawn. Below (White's Outposts), you should notice that black's b-, e-, and g-pawns have all advanced. Because the d-pawn is off the board, there are no black pawns which can defend or attack the c6 square. Meanwhile, white has moved his b-pawn forward so that the b-pawn now defends the c6 square. This is an outpost for white. There's another white outpost, do you see it? Did you notice the advanced e- and g-pawns which leave a hole in black's camp at f6? Did you notice that white's g-pawn defends the f6 square? This is the other outpost that white should look to exploit. h6 and a6 are also an outposts that may be useful. Black also has outposts at a5, c5, and f5. Notice that d5 is not a Black outpost because White's c-pawn can still push forward and defend the d5 square.



White's Outposts

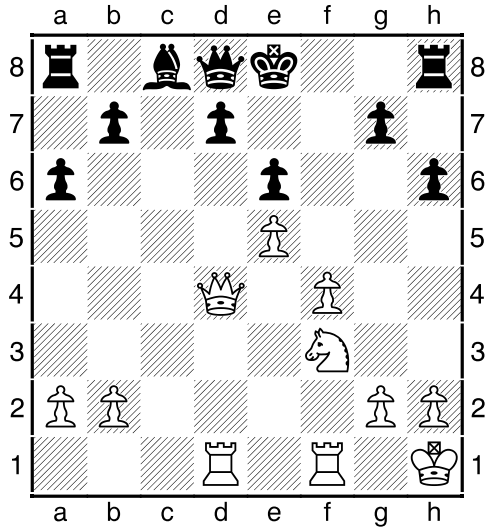


Posted Pieces

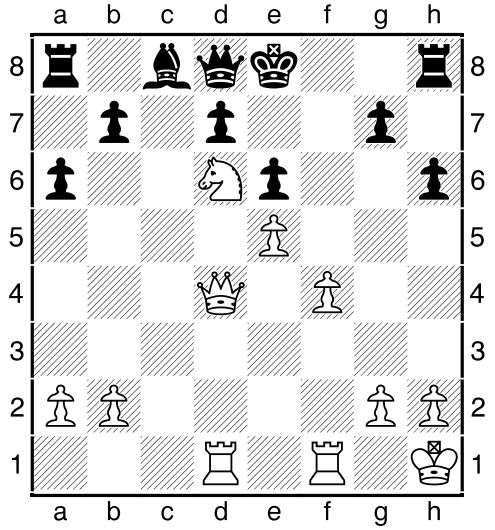
Now look to the second diagram after white has moved Nc6 and Bf6 placing both of his minor pieces on the outpost squares. Notice how much critical space these two minor pieces now control. Mainly, notice their ability to hold the d8 square which black needs to use in order to develop his rooks effectively. But that's not even really what makes them so effective at these outposts. What makes them so effective is that they cannot be threatened by any of black's pieces which would result in a favorable trade for black. For example, no black pawns can attack them which would threaten white with a minor piece for pawn trade. Black cannot even threaten an equal trade because black has no minor pieces of his own. The only possibility is to trade a rook for a bishop or knight which favors white, not black.

Look at the position below. What is white's best outpost? Look for a square which cannot be attacked by black's pawns but is defended by at least one white pawn.

OUTPOSTS: UTILIZING WEAK SQUARES



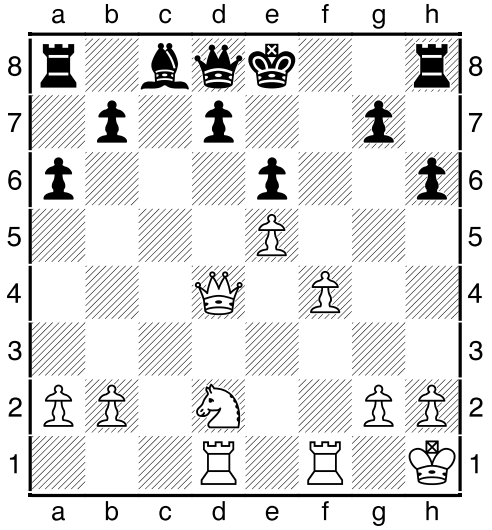
Did you notice the d6-square? Good! Now what piece would white want to maneuver into that outpost? The knight should be your first instinct. White's plan should be to move the knight onto the d6-square (Nd2, Ne4 (or Nc4), finally Nd6). Once on the d6-square, the knight becomes a force to be reckoned with. Notice that the knight would hold the c-file because it holds the c8-square, so white can play Rc1 dominating the c-file (below). Also notice that black can't play d5 to block the knight from moving to e4 because of the possible en passant capture by white's e4 pawn.



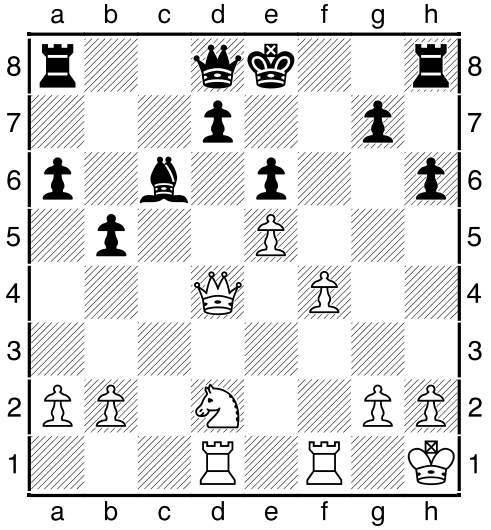
Noticing this weak square leads white to make the long-term strategic decision to start moving the knight there. If black allows this to happen, white will be completely dominant in the position. Black can't allow this to happen, so as white moves his knight towards the outpost, black must move to defend against the threat of a posted knight deep in his territory. So you see how noticing the outpost and maneuvering to take advantage of it can force black to defend. Let's look at how this happens in this position...

OUTPOSTS: UTILIZING WEAK SQUARES

After white moves Nd2, black may spot his weakness and consider how to block the threat (#1). Black would *like* to maneuver the bishop onto c6 (b5, Bb7, Bc6) as in diagram #2. From this position, the bishop blocks the open c-file and holds the dominant knight at bay. So this is black's plan to defend, but there are many problems that black has to deal with as white continues his assault on the d6-square.

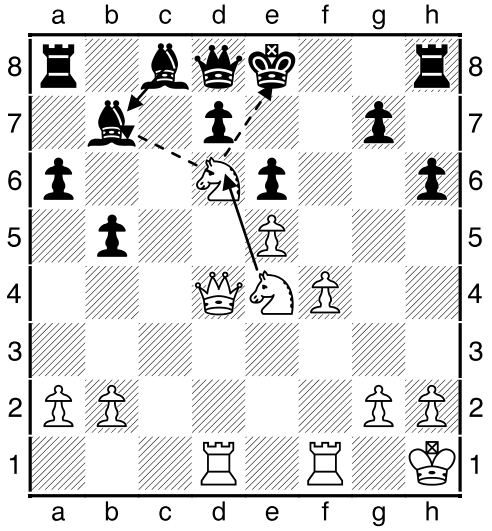


#1

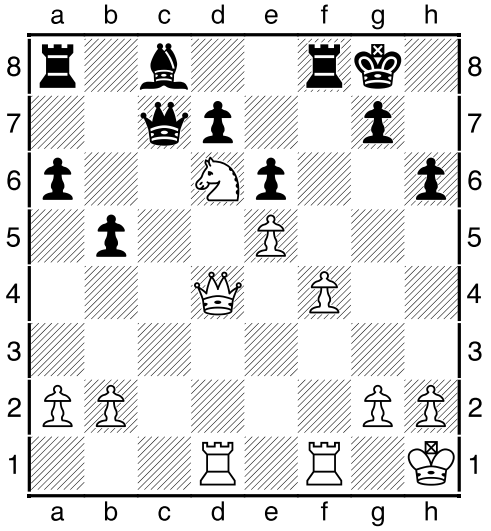


#2

Following the plan, after 1. Nd2 b5, 2. Ne4, black cannot move Bb7 (#3) because white's response of Nd6 forks the king and bishop, winning the bishop for white. So black needs to make a different choice for his second move. Notice that black has to make his decisions based on white's actions. This forcing ability should tell you that white is dominant here. So, black sees the fork threat and decides to castle instead. White moves the knight to the outpost, and black develops the queen to c7 (1. Nd2 b5, 2. Ne4 O-O, 3. Nd6 Qc7), preparing for the development of the bishop to b7 (#4). White can material here, do you see how?

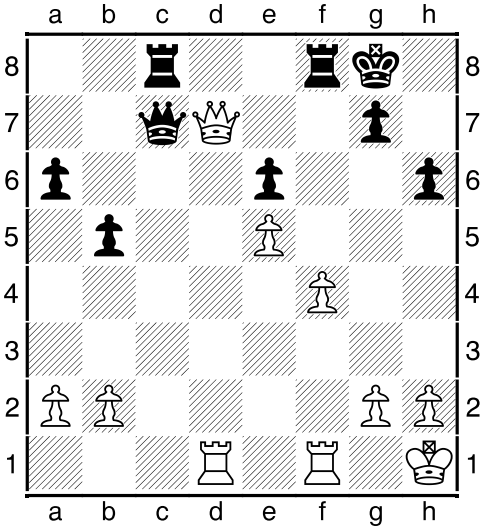


#3



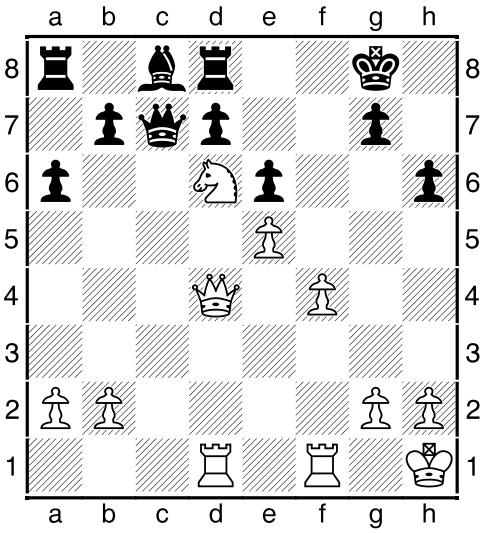
#4

Try knight takes bishop. This removes black's defender of the d7-pawn. After (4. Nxc8 Rxc8), white takes the pawn for free and offers an equal trade of queens: 5. Qxd7 (diagram #5). White gains a pawn advantage, but fails to hold the pressure on black's position. In this close game, relieving the pressure may not be a very good thing. If white relieves the pressure, black will gain some mobility with his remaining pieces. White wants to keep the pressure on. Notice, particularly, that white has the option of trading down material, so black should try a different line of defense starting way back when white moved 1. Nd2.



#5

Let's assume that black saw all this in the position earlier and decides to castle immediately after 1. Nd2. This allows black to move Rd8 adding a defender to the d7 pawn. Here's the full line: 1. Nd2 O-O 2. Ne4 Qe7 3. Nd6 Rd8 (diagram #6).



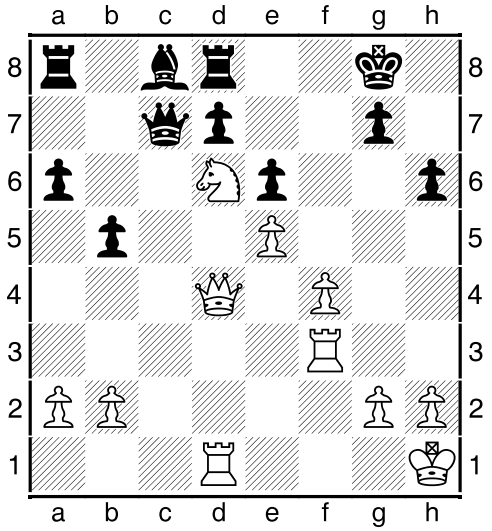
#6

This is not actually black's best line of defense because all of his pieces are tied down to defending the d7-pawn. All this happens because white has utilized the threat of the d6 outpost. Black's best line of defense is to sacrifice the d7-pawn in order to gain mobility, as explained earlier. From this position white can play Rf3 preparing to triple the battery on the d-file. Black is stuck, and white is developing.

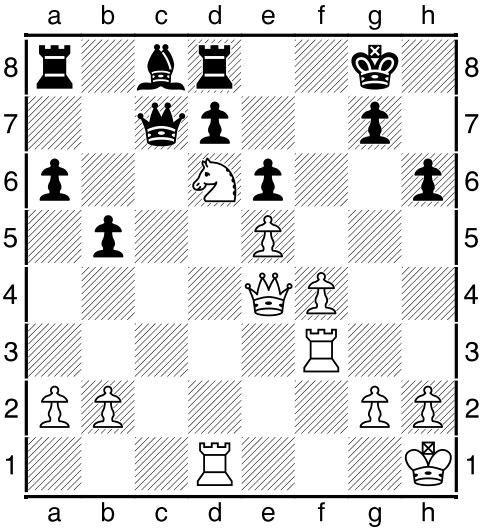
OUTPOSTS: UTILIZING WEAK SQUARES

The key element of this position is the knight on d6. It keeps all of black's pieces tied down to defense. None of black's pieces are actively working against white. This raises another element key to chess strategy, the principle of two weaknesses. Black has a weak d7-pawn, developmental problems, and now has a weak king position (all the defending pieces are stuck on the queenside far away from the king!). So black has two weaknesses, the d7-pawn and now the g7-pawn. Since black has development issues, he cannot defend both weaknesses.

So let's say that black finally plays b5 trying to develop the bishop (1. Nd2 O-O, 2. Ne4 Qe7, 3. Nd6 Rd8, 4. Rf3 b5) (diagram #7), what should white play here? How can white maintain his pressure while beginning an attack on the kingside?



#7



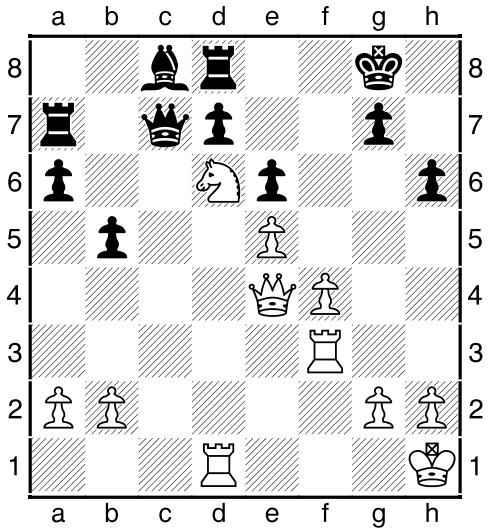
#8

Try moving the queen to e4, 5. Qe4 (diagram #8). This move threatens to capture the unprotected a8-rook while also threatening to move Qg6, blocking the g7-pawn weakness. Notice that black cannot defend the rook by moving Bb7 because the b7-square is attacked by both white's queen and white's knight.

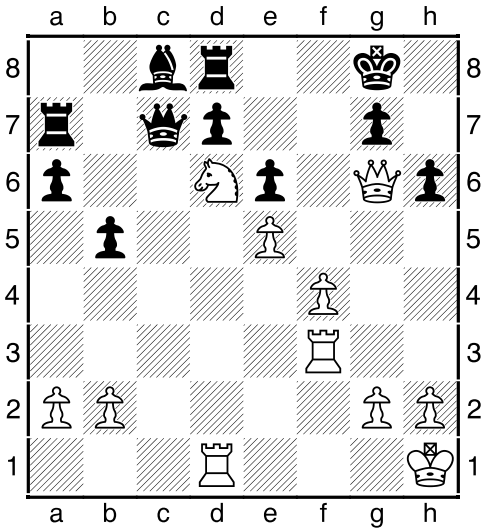
With 5. Qe4, white successfully manipulates both weaknesses because his pieces are developed well while black's pieces are not. White has continued to develop his attacking idea while black has been completely unable to do so. Notice how the material is even, but white has manipulated his advantages of position and time to force a favorable board position. Since white spotted the outpost and started moving towards it, white has forced the position and now completely dominates. Now let's look at how to finish the game.

OUTPOSTS: UTILIZING WEAK SQUARES

Black has to move the a8-rook, let's say he moves 5. Qe4 Ra7 (#9). Now white can jump into the kingside with 6. Qg6 (#10). This queen move blocks the weak g7-pawn from moving forward, taking advantage of black's second weakness.

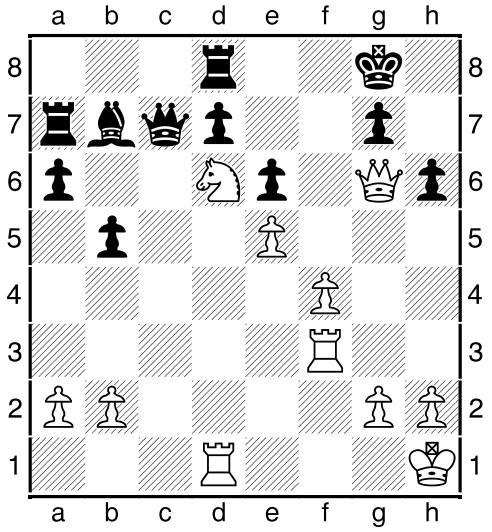


#9

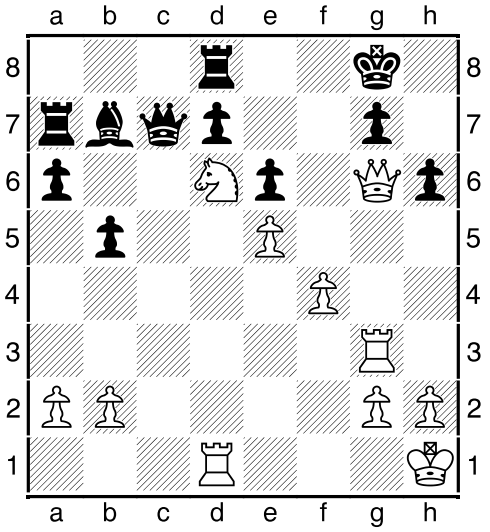


#10

Now that white is developing the kingside attack, black has to defend, but all his pieces are still stuck on the queenside, and black has no time to return and defend. If black played Rf8, it would be a pointless move which does nothing to stop white's plans. So, black might try a last-ditch attack, say 6. Qg6 Bb7, developing the bishop and attacking (diagram #11). What should white do now? His f3-rook is under attack, and he wants to continue the attack on black's king position...



#11



#12

White has the simple response of 7. Rg3, forming a battery on the weak g6-pawn (#12). From here, black has no hope of recovery; white will mate in 2 moves at most (Qxg6++). Notice that one key element in this combination was forcing black's queen and rooks away from the direction of attack. The queen is blockaded on the queenside by the d7-pawn and has no chance of entering the kingside defense. This complex strategy all began with a simple observation of the weak square/hole/outpost at d6.

TRADING: WHAT TO TRADE AND WHEN…

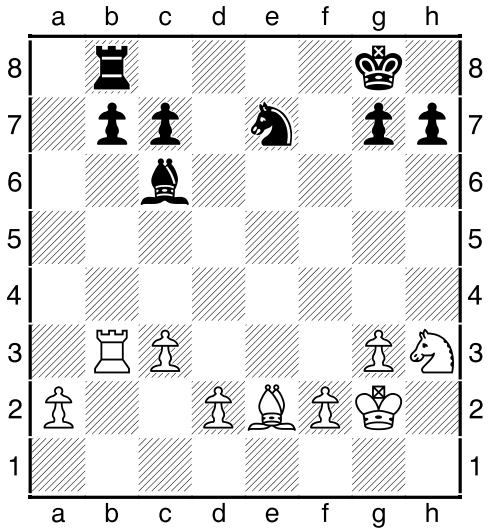
Having studied the basic strategies involved with chess, we turn our attention to one final consideration: trading. How do we know when to trade pieces, and how should we know what pieces to trade?

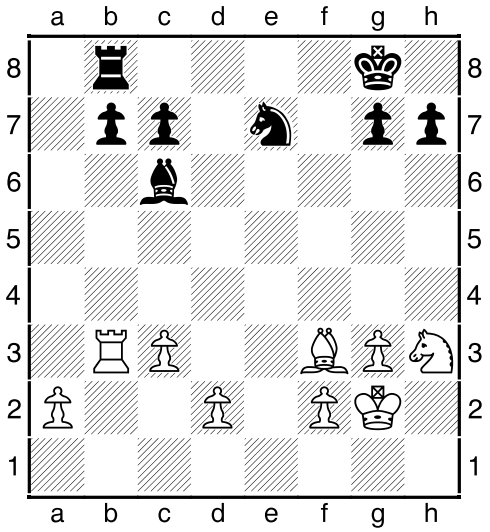
When it comes to trading, there are four guiding principles:

1. Trade when you're ahead in material
2. Trade when you have a spatial disadvantage
3. Trade when it will make one of your remaining pieces more powerful
4. Trade when you'll be removing a powerful piece from your opponent

First, trade when you're ahead in material. Think about it this way, early in the game, if you were to remove one pawn from your opponent, you have a slight material advantage (38:39). If you then remove all the pieces except pawns, your advantage becomes larger because you now have a better ratio of material (7:8). Let's say you then removed most of the pawns. Leave your opponent with one, and leave yourself the one pawn advantage. You now have a HUGE advantage in material (1:2). Now remove a pawn from both sides. Your opponent has a king; you have a king and a pawn, obviously an advantage in the endgame. And this holds true with all pieces. If you already have a material advantage, trading equal pieces will actually increase your advantage. Defensively, the opposite must be considered, as well. If you are at a material disadvantage, you will want to avoid trading pieces.

Below, we see a simple demonstration of this principle. Black has checked white's king, and white can either move the king or block the check. White has a material advantage (a-pawn), so blocking the check with the bishop and offering a trade is beneficial to white's game (second diagram). After white blocks the check, black should probably move the bishop away in order to try and avoid the trade. Trading bishops here would increase white's advantage while it would also increase black's disadvantage.

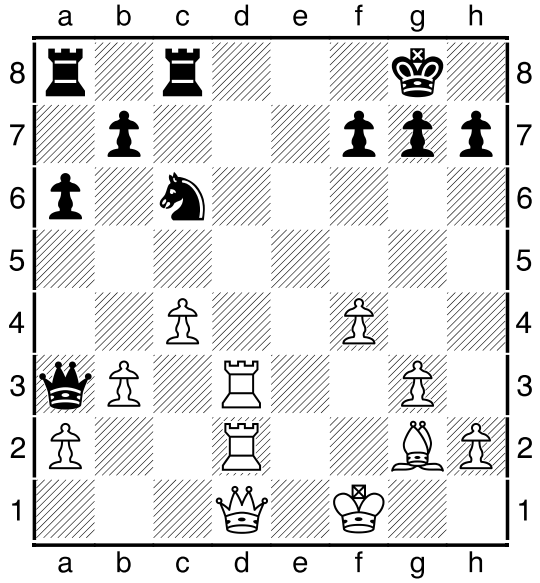




Now, let's turn our attention to a position that can help us see just how effective trading down material can be...

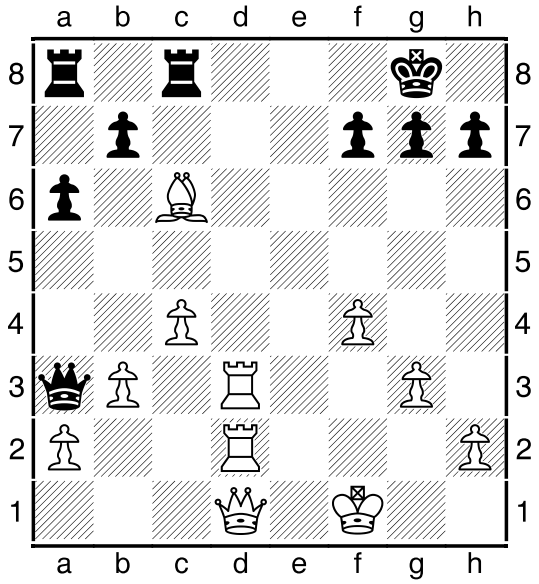
In the diagram below, what should white do that will lead to a series of exchanges ending in a favorable endgame position? White has a single pawn advantage on the queenside, and black has a weak back rank that can be attacked.

TRADING: WHAT TO TRADE AND WHEN...

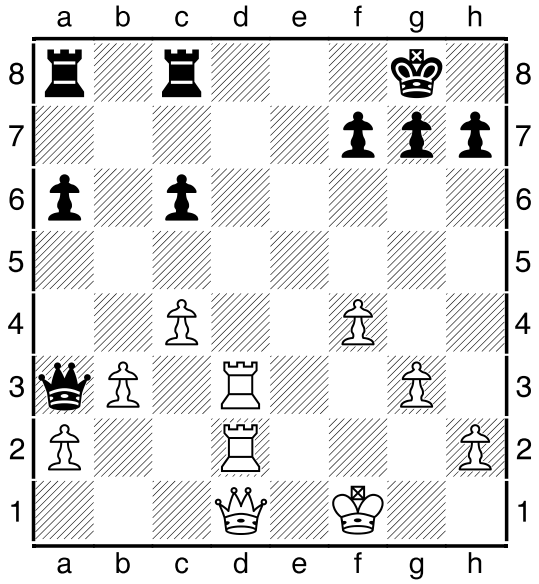


White to move...

Just remember, the key element is the material difference of a single pawn. White wants to make a move to that will trade equal material so that the position leaves the single pawn advantage with fewer pieces. Try Bxc6...



1. Bxc6

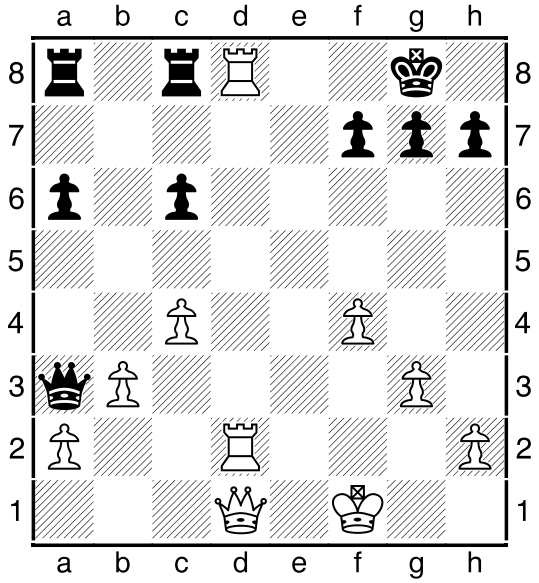


1. Bxc6 bxc6

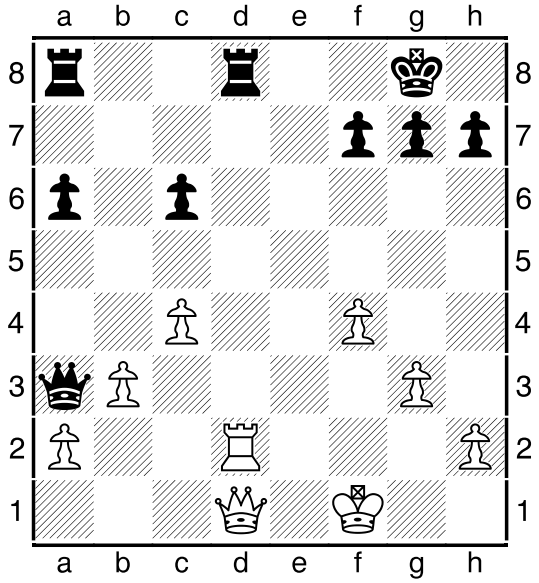
Now black has to choose between retaking the bishop or allowing white to take a knight for free. Assuming that black retakes the knight (there's not really any other good option here...), what is white's follow-through? Remember, we still have material equality, and we want to trade down the material, exploiting black's weak back rank...

TRADING: WHAT TO TRADE AND WHEN…

The most important part of this problem is that you want to force black into making moves that will benefit white. We've seen how the first move semi-forces black into trading down material (not a good thing for black, but a great thing for white...). We need to see how white can now force black into trading material. The most forcing kind of move is a check, so look for a way that white can check black and force his reply. You see the weak back rank, and you should see white's triple battery (rook, rook, queen) aiming at the d8 square. Try Rd8+. Black now has only a single (good) option to stop check, rook takes rook. If black moved Qf8, white would move Rxf8+, trading rook for queen and increasing the material advantage, so black must take with his rook.

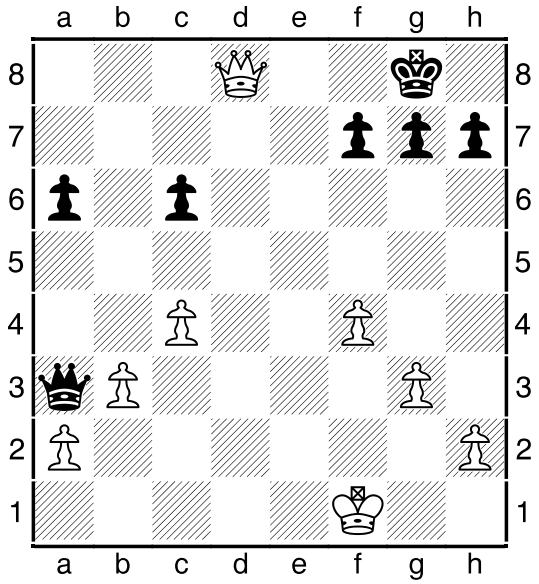


2. Rd8+

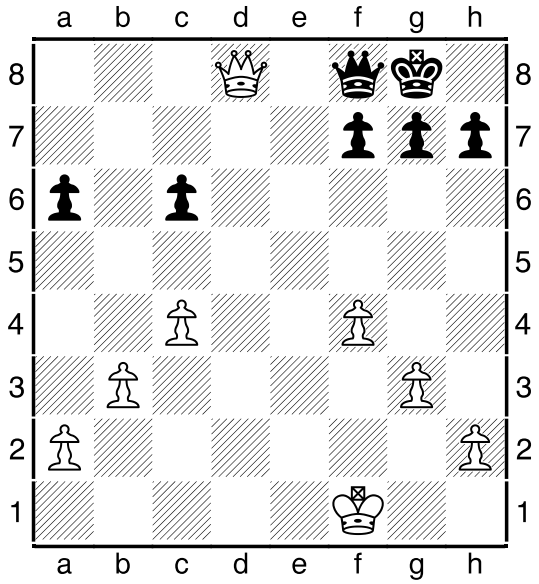


2. Rd8+ Rxd8

Now what? White should continue forcing the trades, below we see the follow through: 3. Rxd8+ Rxd8, 4. Qxd8+. Now black's ONLY option for stopping check is Qf8. White will trade queens, and the endgame begins... White will have 6 pawns to black's 5 and should win if he plays carefully.



4. Qxd8+



4. Qxd8+ Qf8

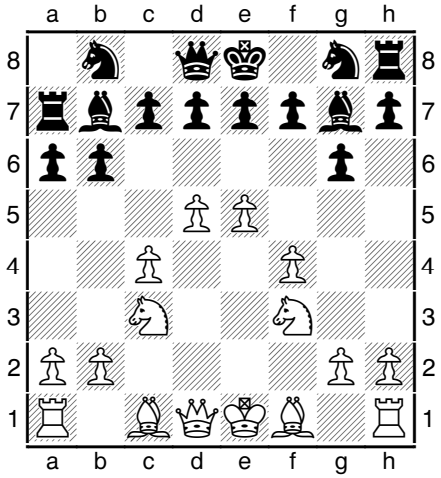
TRADING: WHAT TO TRADE AND WHEN…

Here, we have seen how trading equal material makes a slight advantage even greater by simplifying the position. We need to look for ways to do this when we have a material advantage while avoiding trades when we are down material.

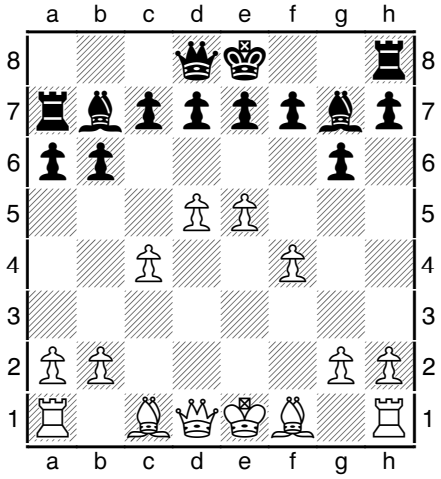
The second situation where trading will benefit you is when you have a spatial disadvantage. When your position is restricted, it stands to reason that trading some material may help alleviate the pressure on your position. Consider the other side of that coin, too. If your opponent's position is cramped, don't offer him the luxury of relieving pressure by trading pieces.

Below, you can see that white has a large spatial advantage, and black is very cramped. White has dominated the center early while black was making flanking moves instead. What, exactly, can black do here? What should black do here? It's easy to see that any sort of viable attack is going to take black a number of moves to create; meanwhile, white can increase his pressure quickly without risking too much.

Consider that white can develop both bishops quickly and effectively (maybe Be3, Bd3). After developing the light-square bishop, white can castle (only two moves). For black to castle, it will take at least three (e6, Ne7, O-O). So, white will want to increase the pressure by continuing development while avoiding trades.

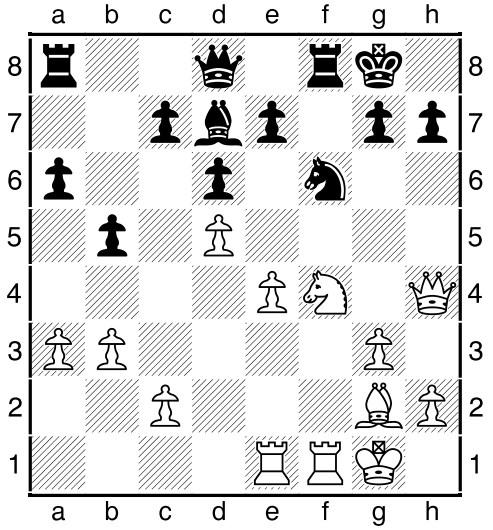


We started this principle by thinking that if we are at a spatial disadvantage, we'd like to trade. Let's eliminate (trade) the knights below. Black can now get back in the game. Here, trading equal material leads to breathing room in the position for black. On the other hand, trading equal material reduces white's pressure on black's game.

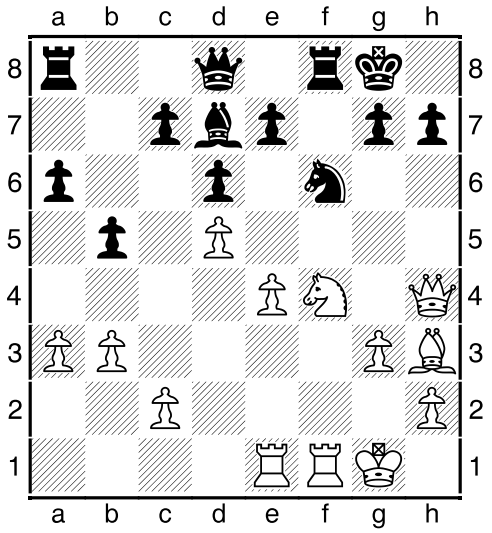


TRADING: WHAT TO TRADE AND WHEN…

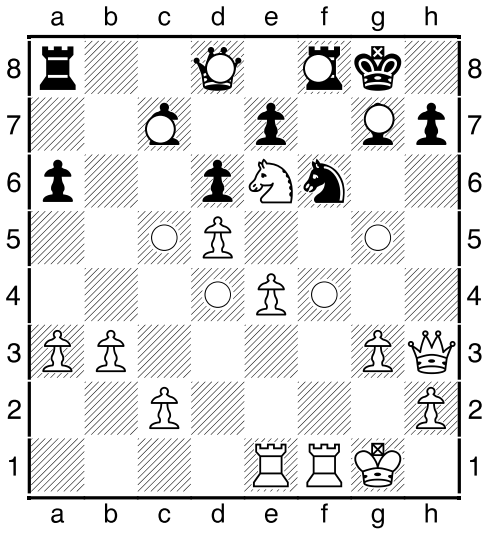
The third principle of trading is trade when it will make one of your surviving pieces more powerful. You know about good and bad bishops. Sometimes, we may be able to trade a knight or bishop which will result in making your opponent's bad bishop even worse. Below, we see a different example. Notice that black has a weakness at e6. What can white do to take advantage of that weakness? Remember, the theme is trading pieces to make one piece stronger. (maybe even removing a defender of the outpost you want to move a piece to…)



We see a number of things in this position. First, you may notice the white knight can move to e6, an extremely strong placement for this knight, but he can't get there yet because it is guarded by black's light-square bishop. Try moving Bh3 (below). After the bishop trade (Bxh3, Qxh3), white will have the ability to move the knight to e6 where it will be a powerful force, influencing eight squares in black's camp.



1. Bh3



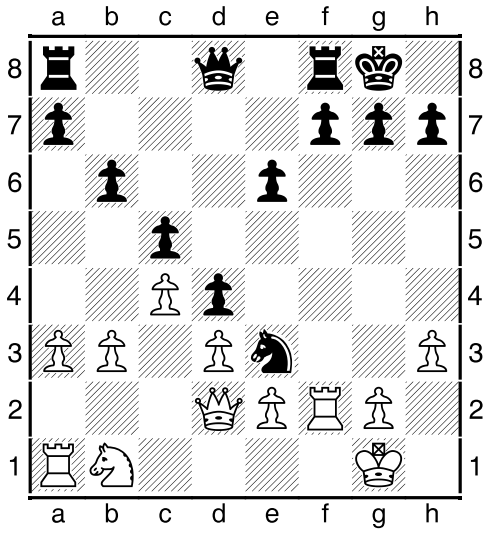
3. Ne6 (outpost)

In this situation, trading the bishops led white to make the knight even more powerful by opening up the outpost at e6. No matter how black defends, white's kingside attack is very strong and will dominate the remainder of the game. So far, we've seen some situations where trading equal material leads to advantages in other aspects of the game (time, position…). Let's look at the final principle for trading…

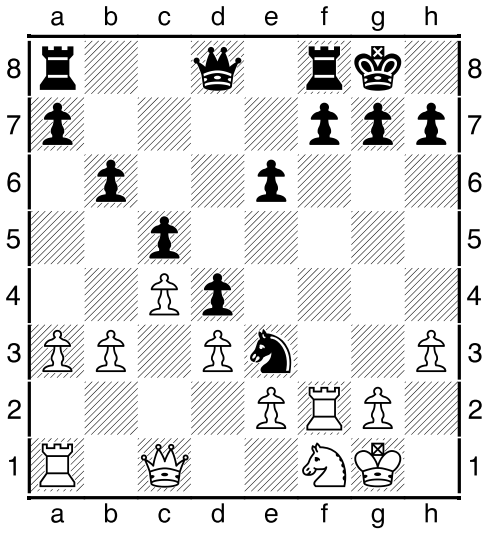
TRADING: WHAT TO TRADE AND WHEN…

The final principle of trading is to trade when you will be getting rid of an opponent's powerful piece. Don't think mechanically and believe this only means a piece is powerful because of its material value. Obviously, if you can trade a knight for a queen, go for it. However, if an opponent's piece is in a powerful position on the board, say, a protected knight in the center of the board, trading equal material to remove this piece would be an advantage to your game.

Below, notice that black has an extremely powerful knight at e3 (#1). From this perch, the knight is holding several key squares in white's camp, and white's idea should be to extricate the knight. There are two options for doing this, but one move is better. What can white do in order to set up for an attack on the knight within a few moves? (Black can maneuver as well, but white can still capture the knight before anything too damaging happens.)



#1



#2

Try Qc1. This allows white's knight to move (Nd2, Nf1) to a position where it will be attacking the black knight and lead to a trade of these pieces (#2). Once both knights are gone, white will have traded equal material while decreasing black's positional strength because the very powerful knight will be gone. Here, we can see that trading pieces of equal material value may be a very good idea because each piece may have a different positional value. Not only should you look for ways to remove pieces of value from your opponent, but you should look for ways to defend your powerful pieces against this type of attack.

The goal in learning these principles of trading is not only to know what to trade and when to trade, but to maneuver positions based on these principles. You should try to set up positions that make this kind of advantage-gaining trade possible while trying to keep your opponent from making these trades and gaining his own advantage. For example, if you have a spatial advantage, avoid trading pieces to allow your opponent breathing room. Also, try to avoid allowing your opponent to force that trade. Apply these principles to your games, and you should start to see positions not only for the here-and-now but for their potential development.

FOR FURTHER STUDY…

This manual has been designed to teach beginners the art of chess; it focuses on teaching the basics of the game. It is worthless without practice and study. You should take what you have learned and apply it to games over and over again. At this point, you should have the ability to learn from your own games because you should at least understand why you are losing games. It will probably benefit your game to revisit these lessons time and again. I myself find that I must relearn the lessons 3 or 4 times before it really starts to make a strong presence in my games. It is always a good idea to practice with any player willing to compete; however, if you find yourself winning game after game, you need to challenge yourself with more difficult opponents. Reach out and find those local chess clubs with people who have been playing all their lives. Find those competitions which go beyond just the local chess-player. Challenge yourself to play against opponents far better than you. Only through challenging play can we hope to improve.

Once you have a firm grasp and understanding of the lessons and principles provided here, you should probably begin studying at a more advanced level. Besides competing against more difficult players, you should begin finding books about chess tactics and strategy. There are thousands and thousands of books on the topic. Choose one aspect of chess and begin exploring. You can easily find books about openings, endgames, tactics, attacking strategy, defensive strategy, using your central game, reading opponent's play, and the list goes on and on.

Begin studying aspects of the game you find intriguing. However, I would recommend studying endgames in great detail. Endgames often offer lessons which can be applied throughout the game. The fringe benefit of studying endgames is that, as each game progresses, you will be approaching your comfort-zone. The more a game moves forward, the closer you will get to the endgame which you have studied. Many players study openings in great detail, and they fail to realize that once the opening is over, they've left their comfort zone and must struggle with the middle and endgame. On the other hand, studying a number of opening lines will definitely help you to improve your chess game by getting you to solid positions that can then be approached using the strategic lessons you've just learned.

One great tool for improving your game is the computer. There are a number of chess tutorial programs which offer not only competition but education in chess. I would most highly recommend the Chessmaster® series of programs by Ubisoft®. It is a great tool, and I have merely scratched the surface of the program's tutorial section. Computers are very challenging because they are methodical and not prone to fatigue like your human competitors. However, learning from computers may make you mechanical in your own thinking which will actually hurt your chances to improve your game.

The best way to learn is to play and study with a more advanced player who is willing to teach you and show you aspects of each move, position, or game which you may not have noticed. You should also annotate your games to learn from your own play. This manual very briefly skims over terms and ideas used by all strategy in chess. Great play is brought about by combining all of these lessons in unique ways.

Finally, never be afraid to lose a game. You can always learn from every game, and we tend to learn more when we lose because we want to know what we did wrong, where we failed to succeed.

At this point, you should have all the knowledge you need to begin learning from your own games. Without all the terms and concepts presented here, you might still lose games without knowing why you lose them. Whenever you find yourself confused as to how an opponent's strategy ended up dominating yours, turn back to these fundamentals. Using all of these concepts in a harmonious way is the core of all chess strategy. No matter how you study beyond this manual, these are the fundamentals which will be used. For now, before you begin studying further, be sure to practice and try using these concepts on your own. Develop your own feel for these elements before you try and grasp someone else's understanding of the game. Developing your own style is the only true way to ever really find a love for the game and dominate all opponents in your path.

SECTION 4: CHESS TEAM DOCUMENTS

➔ CHESS TEAM RULES AND EXPECTATIONS

- ► This section explains the rules and Expectations of the Chess Team. These are the rules by which all participants must operate in order to remain eligible for participation within the team.

➔ MISCELLANEOUS DOCUMENTS

- ► Various documents to help you study more effectively.

➔ IHSA RULES OF PLAY - SUMMARY

- ► This section explains the technical rules of play regulated by the IHSA for competitions. These rules are applied to all rated games in the Chess Team. Players are responsible for knowing all the rules for competitions. Only the common rules are explained here.

➔ APPENDIX: IHSA RULES

- ► The IHSA Rules of Chess Competition in full

CHESS TEAM RULES & EXPECTATIONS

Welcome to the Chess Team! By joining the team, you have committed to competing at a difficult sport that challenges your mind to its fullest capacity. Chess competition can be fierce, so the team should be a place to learn, practice, and grow as a chess player and as a young adult. Chess teaches and forces you to practice several skills that are beneficial in life: foresight, concentration, anticipating the actions of others, detailed planning, depth of thought, recognizing consequences of your actions, and the list goes on. Improving these skills will help you be successful not only in the game of chess, but also in the race of life. That being said, we must establish some rules and expectations for the team.

Below is a list of rules and expectations regarding the Chess Team. All rules will be interpreted in as broad a manner as possible to ensure the integrity of the game and the team. Included below are rules of team meetings, conduct, and game play. Each player is responsible for knowing and following the rules and expectations.

- ***Attendance***
  - Chess Team Members are expected to attend **all practices and competitions** unless there is an excusable absence. If a player knows that he or she will not be in attendance in advance, that student should notify the coach as soon as possible.
  - Team members involved in other sports and activities are welcome to join, but they must be active participants during the competitive winter season (October through February).
  - Practices run every day after school for one hour, please have rides here PROMPTLY. If a team member must leave early, please let the coach know at the beginning of practice.
  - All team participants will need to wear team shirts at competitions.
  - Each team member needs to have a folder and a notebook

- ***Conduct***
  - Respect must be given to all participants at all times. Disrespect will not be tolerated, and if a student acts in an undisciplined manner, he or she may be asked to leave the meeting, the competition, and/or the team.
  - Students must maintain a high level of academic performance in classes. (IHSA eligibility rules do apply to chess team competitions)
  - Any team member who has a failing grade in any class will not be allowed to participate in practices until the grade is brought up to a passing level. These students are expected to be at practice where assistance may be offered (the student can also seek other academic assistance during practice time).
  - Students must also maintain an excellent discipline record throughout the year.
  - Chess Team Members should NEVER gamble on games in any form. Gambling on games will be penalized with removal from the team.

CHESS TEAM CONDUCT EXPECTATIONS

At all times during game play, players should practice the following standards in order to be good sportsmen:

- Never verbally abuse an opponent in any way.
- Never try to influence an opponent into resigning.
- Never make any outward sign that you are frustrated with a game, an opponent, or a move (this could be considered distracting by IHSA, but it may also give your opponent an advantage).
- Never boast about a win. Be humble, you may lose next time.
- Never boast about a particular move. Be humble, the next mistake may be yours.
- Remain seated at the table throughout the entire game (emergencies are the ONLY exception). There is no need to get up, walk around or otherwise be distracted from the game. In fact, you should use every possible second to think about the current position. Leaving a game for any reason is simply distracting and should not be done unless absolutely necessary.
- Propose draws ONLY when a draw is apparent. Repeated requests can be considered a distraction and unsportsmanlike conduct. Also, just as when resigning, drawing a game without reason may be losing a game unnecessarily.
- When resigning, do so in a dignified manner by stating aloud, "I resign," and shaking your opponent's hand. Leaving doubt of your resignation is frustrating, distracting, and unsportsmanlike.
- Only challenge an opponent's play when it is based on solid violation of the rules.
- KNOW all the rules of play in order to understand your rights in the face of an unsportsmanlike opponent.
- Finally, in every chess game, it is vital that you do your very best. Even when you see that you are losing a game, you should try and fight for a win or a draw. You will learn volumes from the games you struggle with while, on the other hand, you may actually learn little from games you win easily. Losing games should not be a frustrating experience; rather, they should be a learning experience. Therefore, there is never really any reason to act in an unsportsmanlike manner. Every game, every mistake is an opportunity for improvement.

Playing in an unsportsmanlike manner at any point associated with the Chess Team (whether in competition, during Team practices, or in casual games) may result in being excused from play for the game, the competition, or the year. Winning competitions is not the sole object of the team. Even if forfeiting an offender's game affects a team score, the offense will still be penalized.

The Chess Team represents the school, and we will put forward a dignified image, no matter the consequences to team scores. This is an expectation of all Chess Team Members. Should a Team Member feel that he or she is unable to comply with this expectation, that person should not expect to participate on the team.

It is inevitable that you will encounter unsportsmanlike behavior from opponents, and it is *your responsibility* to act properly in the face of such a situation.

MISCELLANEOUS DOCUMENTS

PRACTICE REQUIREMENTS

Each week, team members must...

1. Complete **at least one Analysis activity**: Position Analysis, Chess Game Analysis, OR work with a coach
2. Complete **at least one Self-Study activity:** 2 workbook pages, OR Complete a Quiz
3. Complete **at least one Rated Chess Game** *(competitions count)*
4. **Attend all practices** unless there is an excused absence

- *The coach may take a practice for other purposes, it is the player's responsibility to be sure the requirements have been met.*
- *If one of these is not completed, the team member will not be allowed to compete at the next competition. If any are repeatedly not completed, the student may be asked to leave the team.*

Options for Chess Team Practice Time:

When team members first arrive, they pick up their folder and notebook, then choose one of the following activities to do:

- **Required study:** position analysis, game analysis, complete workbook pages, or work on a quiz
- **Work with a coach** who is teaching lessons or reviewing games
- **Play a Rated Chess Game**
- **Independent study:** study a chess book, solve the puzzle of the week, or work in computer software

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Position Analysis

- Position Analysis worksheets are provided by the team area.
- Label each analysis with: Player name and the date the analysis is written
- The worksheet should be filled out completely and reviewed with a coach.

Chess Game Analysis

- Analyses will be written in the team member's notebook
- Label each analysis with: Game information (players, teams, etc.) and the date the analysis is written
- Analysis will include accurate, complete notation, during which the following narration should occur:
  - An accurate retelling of what you were thinking at various points of the game
  - Highlight key shifts in the position/pace/flow of the game
  - Highlight of blunders and how you reacted (own and opponent's)
  - Highlight specific positions where you didn't know what to do and how you solved it
  - At least one question you have about this game

Workbook Pages and Quizzes

- The player writes their answers in the notebook labeled with Page/Quiz Title, Page, and Problem #s
- Player then has the coach or another player check the answers, marking incorrect responses
- Player should then attempt the problems again until they find the correct solution

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Rated Chess Game *(competition games count for this requirement)*

- Time Control: 25 minutes +5 second delay (setting 18 on the DGT clocks)
- Pairings must be checked with a coach before the game begins
- Notation is required and must be legible and accurate *(check and correct it before turning it in)*
- Time remaining on each player's clock must be recorded at the end of each game
- Notation sheet must be turned in for entry into the team database *(Notation MUST be accurate for a game to count)*

Awards:

- **Throughout the season, each team member earns points for each of the following:**
  - Completing workbook pages — 1 page = 1 point
  - Completing a Quiz *(14 quizzes total)* — 1 quiz = 1 point
  - Completing a Positional Analysis — 1 analysis = 1 point
  - Accurately solving the Puzzle of the Week — 1 solution = 1 point
  - Having a "Great Game" performance — 1 Great Game = 1 point
  - Finding a "Great Move" during a game — 1 Great Move = 1 point
- These points will help determine Board Rankings, and
- These points will also be tabulated at the end of the year for a variety of awards.

BENJAMIN FRANKLIN: ON THE MORALS OF CHESS

The game of Chess is not merely an idle amusement. Several very valuable qualities of the mind, useful in the course of human life, are to be acquired or strengthened by it, so as to become habits, ready on all occasions.

1. **Foresight**, which looks a little into futurity, and considers the consequences that may attend an action; for it is continually occurring to the player, 'If I move this piece, what will be the advantages or disadvantages of my new situation? What use can my adversary make of it to annoy me? What other moves can I make to support it, and to defend myself from his attacks?

2. **Circumspection**, which surveys the whole chessboard, or scene of action; the relations of the several pieces and situations, the dangers they are respectively exposed to, the several possibilities of their aiding each other, the probabilities that the adversary may make this or that move, and attack this or the other piece, and what different means can be used to avoid his stroke, or turn its consequences against him.

3. **Caution**, not to make our moves too hastily. This habit is best acquired, by observing strictly the laws of the game; such as, If you touch a piece, you must move it somewhere; if you set it down, you must let it stand. And it is therefore best that these rules should be observed, as the game becomes thereby more the image of human life, and particularly of war . . .

And lastly, we learn by Chess the habit of not being discouraged by present appearances in the state of our affairs, the habit of hoping for a favourable change, and that of persevering in the search of resources. The game is so full of events, there is such a variety of turns in it, the fortune of it is so subject to sudden vicissitudes, and one so frequently, after long contemplation, discovers the means of extricating one's self from a supposed insurmountable difficulty, that one is encouraged to continue the contest to the last, in hopes of victory from our own skill, or at least of getting a stalemate from the negligence of our adversary . . .

If your adversary is long in playing, you ought not to hurry him, or express any uneasiness at his delay. You should not sing, nor whistle, nor look at your watch, not take up a book to read, nor make a tapping with your feet on the floor, or with your fingers on the table, nor do anything that may disturb his attention. For all these things displease; and they do not show your skill in playing, but your craftiness or your rudeness.

You ought not to endeavor to amuse and deceive your adversary, by pretending to have made bad moves, and saying that you have now lost the game, in order to make him secure and careless, and inattentive to your schemes: for this is fraud and deceit, not skill in the game.

You must not, when you have gained a victory, use any triumphing or insulting expression, nor show too much pleasure; but endeavor to console your adversary, and make him less dissatisfied with himself, by every kind of civil expression that may be used with truth, such as 'you understand the game better than I, but you are a little inattentive;' or, 'you play too fast;' or, 'you had the best of the game, but something happened to divert your thoughts, and that turned it in my favor.'

If you are a spectator while others play, observe the most perfect silence. For, if you give advice, you offend both parties, him against whom you give it, because it may cause the loss of his game, him in whose favor you give it, because, though it be good, and he follows it, he loses the pleasure he might have had, if you had permitted him to think until it had occurred to himself. Even after a move or moves, you must not, by replacing the pieces, show how they might have been placed better; for that displeases, and may occasion disputes and doubts about their true situation. All talking to the players lessens or diverts their attention, and is therefore unpleasing.

Lastly, if the game is not to be played rigorously, according to the rules above mentioned, then moderate your desire of victory over your adversary, and be pleased with one over yourself. Snatch not eagerly at every advantage offered by his unskillfulness or inattention; but point out to him kindly, that by such a move he places or leaves a piece in danger and unsupported; that by another he will put his king in a perilous situation, etc. By this generous civility (so opposite to the unfairness above forbidden) you may, indeed, happen to lose the game to your opponent; but you will win what is better, his esteem, his respect, and his affection, together with the silent approbation and goodwill of impartial spectators.

MISCELLANEOUS DOCUMENTS

GUIDING PRINCIPLES OF GOOD CHESS

- Play with the calm light of reason and avoid emotional reactions.
- Deal in facts, not in paranoia.
- Fight to the death.
- Protect your king.
- Always assume your opponent will make the best move; never play a move hoping that your opponent will not see the threat.
- Openings:
    - Develop, Attack, Defend, Prevent, Prepare
    - Control the center
    - Control space
    - Steal tempo whenever possible
- Moves:
    - Always ask, "What was (will be) left behind?"
    - Study your opponent's moves carefully. Ask yourself what he is threatening or planning, and think prophylactically.
    - If you're ahead in position, try to restrain your opponent as much as possible before dealing the death blow
- When in doubt:
    - Improve your position; even if you can't figure out any benefits for doing so.
    - Look for something to attack
    - Be sure you're not under attack...
    - Activate your least active piece
    - Still in doubt? Make a small, non-consequential move and let your opponent create his own weakness...
- Position:
    - Be aware of how the pawn structure shapes the position
    - Be aware of how well each piece can move within the position
    - Find and be aware of every weakened square and every outpost
    - Always improve the position of your worst piece
    - Try to limit the activity of the enemy pieces
    - Pawns can't move backwards, think carefully about every pawn move
    - Look for ways to disrupt your opponent's pawns (and beware your opponent disrupting yours...)
- Trading:
    - What stays on the board is FAR more important than the pieces that leave the board
    - Always consider the position before deciding which pieces to eliminate
    - When in a cramped position, trading equal material may open breathing room
    - When ahead in material, trading down will generally improve the power of each remaining piece
    - Don't trade equal material unless you have a specific reason to do so
    - A bishop and knight is better than a rook and pawn... Two rooks trump a queen...
    - Enemy pieces guarding weaknesses should be traded
- Defense:
    - Always believe that your position is defendable
    - First verbalize, then analyze.
    - Defend actively
    - When in defense mode, watch for your opponents to over-extend themselves
    - A draw from a losing position is good; it's far better than losing...

GUIDING PRINCIPLES OF GOOD CHESS *(continued)*

- Attacking:
  - When attacking the king, don't just check him randomly. First, cover his escape squares; that way your checks will build into a mate. This is called building a "mating net."
- Endgames:
  - In the endgame, each mistake can be the last, therefore each move must be precise
  - King activity is key
  - In the endgame, wing pawns tend to be more valuable
  - Passed Pawns must be pushed!!!
  - Opponent's passed pawns should be blockaded
  - Pawn weaknesses should be pushed up the board
  - Checkmates always take more than one piece
  - There's no need to rush, Patience Pays
  - A pawn ahead is only a pawn ahead if you can promote it
  - Zugzwang. Period.
- The art lies in finding the exceptions, but you are already a strong player IF you know the principles and understand where and when to apply them.

Types of Imbalances:

- **Superior Minor Piece** *(the interplay between Bishops and Knights)*
- **Pawn Structure** *(a broad subject that encompasses doubled pawns, isolated pawns, etc.)*
- **Space** *(the annexation of territory on a chess board)*
- **Material** *(owning pieces of greater value than the opponent's)*
- **Control of a key line, file, or square** *(files and diagonals act as pathways for your pieces, while squares act as homes)*
- **Lead in Development** *(more force in a specific area of the chess board)*
- **Initiative** *(dictating the tempo of the game)*

Silman Thinking Method

1. Figure out the positive and negative imbalances for both sides
2. Figure out the side of the board you wish to play on. *(You can only play where a favorable imbalance or the possibility of creating a favorable imbalance exists)*
3. Dream up various fantasy positions, i.e., the positions you would most like to achieve.
4. Once you find a fantasy position that makes you happy, you must figure out if you can reach it. If you find that your choice was not possible to implement, you must create another dream position that is easier to achieve.
5. Only now do you look at the moves you wish to calculate (called "candidate moves"). The candidate moves are all the moves that lead to our dream position.

MISCELLANEOUS DOCUMENTS

NOTATION CHEAT SHEET

Basic Questions that each notation should answer:

1) What piece is moving? (**B**=Bishop, **N**=Knight, **R**=Rook, **Q**=Queen, **K**=King, _=pawn) *pieces are uppercase*
2) Is it capturing anything? (=move, X=capture)
3) Where did it move to? (a-h= file, 1-8=rank; a4, e6) *files are lowercase*
4) Did it place the king in check? (__=no check, +=check, ++ or # = checkmate)
5) IF another of the same piece moved there, which file or rank did it come from (only Rooks and Knights)?
   (file if on the different files, rank if on different ranks)

	Move	Capture	Check	Both	Special moves	
Pawn moves:	e4	exd5	e7+	exf7+	e8=Q (*promotion)*	exd6(ep) *(en passant)*
Bishop moves:	Bc4	Bxc4	Bc4+	Bxc4+		
Queen moves:	Qd4	Qxd4	Qd4+	Qxd4+	*(pieces on same file)*	*(pieces on same rank)*
Knight moves:	Nc6	Nxh8	Nf2+	Nxf2+	N6b5	Nfe8
Rook moves:	Re1	Rxe5	Re8+	Rxe8+	R8e5	Rhe5
King moves:	Kg2	Kxh2	Ke3+	Kxe3+	O-O *(short castle)*	O-O-O *(long castle)*

ORDER OF OPERATIONS & BASIC NOTATION

1. **Think**
   a. **Candidates?** (What are my candidate moves?)
   b. **Best?** (What's my BEST move?)
   c. **Double Check** (Will that move lead to a problem, tactical or otherwise?)
   d. **Decide.** (Decide on the RIGHT move)
2. **Make the Move**
3. **Punch the Clock**
4. **Notate CORRECTLY**
5. **Opponent Moves**
6. **Opponent Punches the Clock**
7. **Notate Opponent's move**
8. Repeat…

Pawn moves…	e4	exd5	e8=Q	exd6(ep)	
Bishop moves…	Bc4	Bxc4	Bc4+	Bxc4+	
Queen moves…	Qd4	Qxd4	Qd4+	Qxd4+	
Knight moves…	Nc6	Nxh8	N6b5	Nfe8	Nfxe8
Rook moves…	Re1	Rxe5	R8e5	Rhxe5	Rexh5
Castling…	O-O	O-O-O			
Checks…	Nc6+	Qxb7++			

IHSA Rules of Play: Summary of Common Rules

The IHSA regulates all Illinois High School sports including chess. This section is designed to teach players the common rules of play that each player should know before entering a competition. IHSA does not allow coaches to intervene in a game, so it is imperative that every player knows each and every rule of play governing competition games because he or she must be the one to notify officials if rules are not being followed. This section of the Team Manual only covers the most common rules. Before competing, every player needs to be familiar with all the rules.

Beginning of the Game

- Proper boards, pieces, and clocks must be provided by the player playing the black side. (the complaining player must be able to provide a "more accurate" set of equipment)
- The board must be set up properly at the beginning of the game. If after the start of the game, the board is found to have begun improperly, the position is transferred to a proper board and the game continues from that point.
- Chess clocks must be used
- Each player must take the notation of the game (some form of algebraic notation is to be used)

Moving

- A move is ***determined*** but not completed once you have removed your hand from the chessman. This means that you cannot change your move and your opponent may move his piece
- A move is ***completed*** once the move is determined and the chess clock has been punched.
- A piece can only be adjusted on your own turn, and it must be announced by saying either, "adjust," or "j'adoube." You can only adjust your own pieces.
- The rules of touching pieces are complicated, but, in essence, once you touch a piece, you must move it. If you touch an opponent's piece that indicates that you are capturing that piece and the move must follow. DON'T touch pieces until you are sure of your move, and then touch only those pieces. This will avoid any doubts.
- If you think your opponent touched a piece then moved illegally, you must protest to a steward immediately, your opponent must have touched the piece with the intent of moving it (before you touch a piece to move).
- A piece is an extension of your hand. Therefore, if you touch a piece with a piece, it is the same as if you touched it with your hand.
- If a piece is inadvertently knocked over, the position must be fixed before the game continues. The opponent may punch the clock without moving in order to make the offender fix the position on his or her own time.
- When capturing, either piece may be touched first as long as the capture is legal. (My recommendation is to touch your own piece first, then capture and place at the same time)
- When castling, there is no penalty if the rook is touched first, provided that there is no long pause before the king is moved. (My recommendation is to get in the habit of moving the king first, then the rook; this prevents doubt)
- When promoting, the pawn must be moved to the eighth rank first then promoted.

- When promoting, your move is not completed until the pawn has been exchanged. DO NOT punch the clock until you have exchanged the pawn for the promoted piece, lest you risk a penalty.
- If it is found that a player moved illegally (moved into check, etc.), it must be caught and protested within 5 moves or else it stands and the game continues.
- Players are NOT required to announce check. (IHSA rules actually discourage this practice, so **be aware** of the board to avoid making illegal moves, and when placing your opponent in check, watch to be sure he or she properly defends against the check or say check quietly, respectively)

Won Games

- A game is won when one player checkmates an opponent.
- A game is won when an opponent resigns. (A player who resigns must say, "resign." A handshake is not a resignation. Our team should never resign a game; force the opponent to end the game! Also, be prepared for opponents who refuse to resign. You must be able to end the game!)
- A game is won when an opponent runs out of time (provided you still have enough material to checkmate), and players must claim the win on time.

Offered Draw Games

- The proper way to offer a draw is to: move the piece, offer the draw, then punch the clock.
- Once offered, a draw offer cannot be withdrawn.
- Rules regarding offered draws prior to 10 moves are tough, just don't do it.
- A proposal for draw can be accepted or rejected orally or rejected by making a move.
- Any attempt to find out if an opponent would accept or reject a draw is considered an offer for draw. IHSA rules are fairly specific regarding wordings that would be considered an offer for draw. Generally, don't talk about a draw when playing unless you are offering a draw to your opponent.
- An illegal offer of draw can be penalized by adding 2 minutes to the opponent's clock

Other draws

- A draw can be demanded if the players have reached the exact same position three times (including black/white to move) at any point in the game. The person claiming the draw must be able to prove it, and needs to make the claim BEFORE making the move which leads to the repeated position the third time.
- This type of draw must be claimed on the move which creates the repeated position or else the opportunity is forfeited until the position is repeated again
- If you claim this type of draw illegally, you will be penalized
- Another type of draw can be claimed if no pieces have been captured and no pawns have moved for 50 moves. The person claiming this draw must be able to prove it.
- King and piece endings can also be considered draws, be aware of the rules.
- Be aware of all types of draws by insufficient material

IHSA Rules of Play: Summary of Common Rules

Chess Clocks

- Chess clocks must be used
- NO ONE may EVER remind a player to punch his or her time clock
- Anyone who indicates to a player that the clock must be punched will be penalized
- Players may stop both clocks under special circumstances (mainly to ask a steward for rules clarifications, but be aware of the circumstances)
- A player who punches the clock without moving is penalized by adding 2 minutes to the opponent's clock
- Any player using excessive force on a clock may be warned and penalized (up to the loss of a game)

Notation

- Each move must be recorded (including your opponent's moves).
- If a player gets behind in recording by 3 moves, the opponent may object to a steward. An offender gets one warning, then a penalty, then a forfeit. (Just keep up!)
- A player in time trouble does not need to record moves (see Time Trouble)
- You may record a move before making that move. You may change a move if you have recorded it prior to making the move.

Time Trouble

- Time Trouble is when a player has less than 5 minutes in a game.
- When in Time Trouble, you must:
    - handle the clock with the same hand as you handle the chessmen
    - remove your hand from the clock completely until it is time to punch the clock again
    - not pick up the clock
    - replace chessmen on your own time if you accidentally move them
- rules regarding illegal moves shrink to a gap of only two moves to catch the mistake
- If either player is in Time Trouble, any dispute stops both clocks while a Steward is being summoned

Rules of Conduct

- Never humiliate an opponent in any way. EVER.
- You are not allowed to leave your game table without first notifying a steward
- Never kibitz any player (kibitzing is offering advice to players, solicited or not). Be aware that any discussion near any game may be considered kibitzing.
- A general rule is don't discuss games anywhere near ongoing competition games
- No skittles (practice games) can occur in the playing room
- Only review games in the designated area
- As soon as your game is over, you must pack up the equipment
- All spectators should remain quiet in the playing room (once your own game is completed, you immediately become a spectator)

I. Coach's Guide

II. Index to Frequently Consulted Rules

III. IHSA Chess Rules

IV. Rule Clarifications (anecdotal explanations)

V. Penalty Summary