4. Rooks ♜

Objectives:

1. State and apply rules of movement for rooks

2. Use movement rules to count moves and captures

3. Solve problems using rooks

4. Understand the strategy of rook placement and the timing of when to use rooks

The main objective of this lesson is to teach the rules of movement for the rooks.

The students will play the bishop and rook game in order to practice the rules of movement for these pieces. Just like the pawn game, the winner is the first to get a pawn to the last rank, or to capture all the opponent's pawns, or to achieve a position in which it is the opponent's move, but the opponent has no moves and the player does.

Many students have difficulties at this point. Dealing with the movement of three different chessmen may be difficult to handle. The teacher must be prepared to spend a lot of time allowing the students to practice The Pawn Game with Bishops and Rooks.

When the students have mastered the concepts in this chapter, moving on to play real chess with all of the pieces will come quickly. Moving too fast here, however, will deprive the students of many important concepts that are very useful in using good strategy in the full game of chess.

Outline of lesson:

1. Review of bishop problems

2. Moving the rook

3. Competition with rooks, bishops, and pawns

4. Ideas with rooks and pawns

**PART 1:
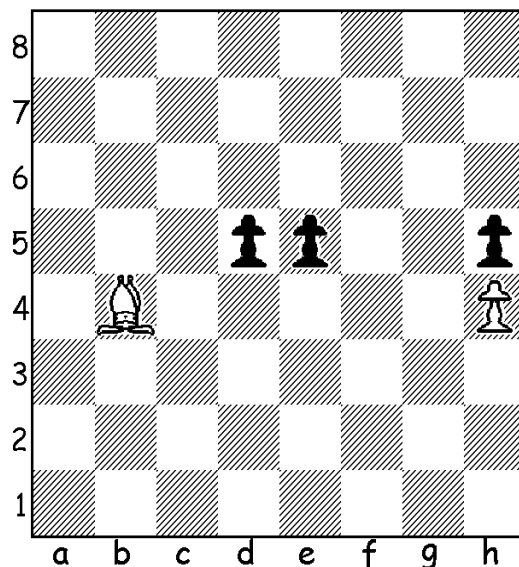REVIEW OF
BISHOP
PROBLEMS**

Before teaching the movement of the rook, it is very important that the students have thoroughly mastered the movement of the pawns and bishops.
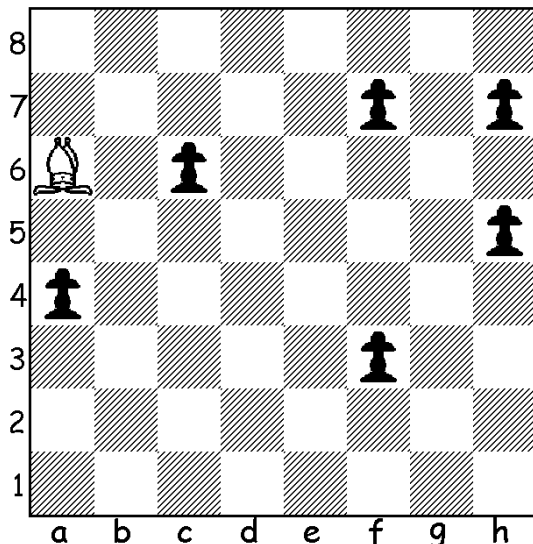
Have the student figure out the minimum number of moves it would take White's bishop to capture all of Black's pawns assuming that the pawns do not move.

By finding an efficient pattern, such as Bd3 – h7 – g8 – f7 –h5 –f3 – c6 – a4 it takes only eight moves.

In the position to the right, it is white's turn to move. Who should win? With proper play, White should win. If White attacks Black's e-pawn, by moving either to c3 or d6 White may force a win. If White moves Bd2 (a passive move that seems to get in the way of the pawns but does not threaten anything) then Black should move the pawn to d4 and go on to win the game.

Review the pin

A pin is a tactic that holds something in place that can then become a target. Bishops are good for creating pins along diagonals but they are not the only piece that are good for creating pins.

Be aggressive

To win at chess, it is important to be aggressive. Create threats. Capture unprotected men. Move pawns forward when the opportunity is there.

PART 2: MOVING THE ROOK

Ask students how a rook moves. Have the students use proper chess terminology. The rooks move along the ranks and files. It is allowed to move along either until it is blocked by its own man or until it captures something. That is, it moves as far as it wants until it bumps into something.

rook captures

Set up the position on the right and demonstrate captures by a rook. Note that the rook may capture the bishop on e2 or the pawn on b5, but may not capture the bishop on a5 because the rook is blocked by its own pawn. It also may not capture the pawn on h5 on this turn because once it captures the pawn on g5 it stops and White's turn is over.
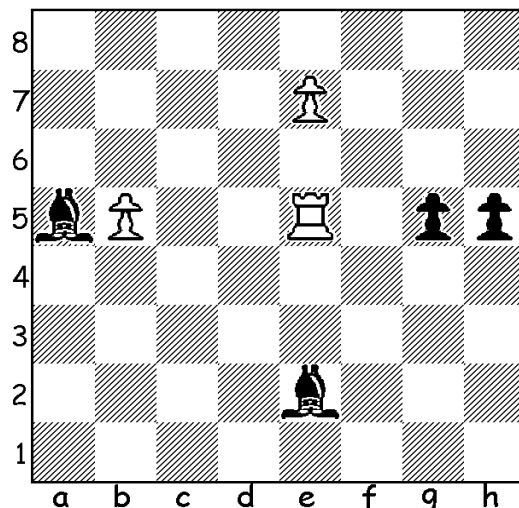
How many different moves may the rook make in the position above? (The answer is 8.) The rook has many squares to choose from, including two different captures. Remember to have students speak answers by naming squares using chess notation. The teacher can also list on the board using chess notation all the moves the rook can make in this position to help the students learn chess notation.

rooks attack/defend each other

Rooks on opposing sides attack each other, and same color rooks defend each other. Rooks along the same rank or file control the same squares between them, and each controls the square that the other rook is on.

In the position on the right, each pair of rooks of the same color is defending each other and both White rooks are attacking Black's rook on f5 while Black's rook on f5 is attacking both of White's rooks.
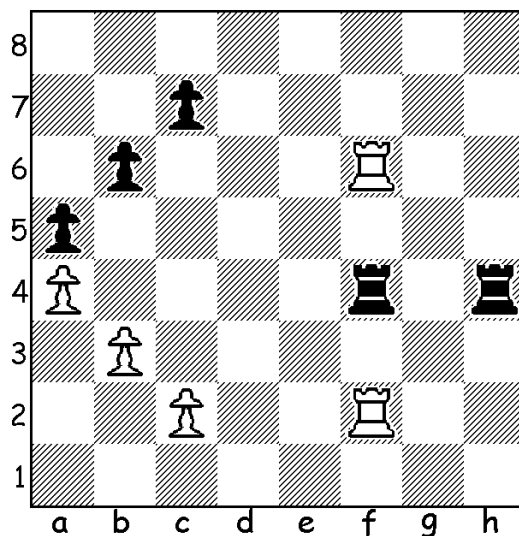
**PART 3:
COMPETITION
WITH ROOKS,
BISHOPS AND
PAWNS**

Students compete with pawns, bishops, and rooks. As before, there are three ways to win: (1) advance a pawn to the last rank (2) capture all of your opponent's **pawns** (it is not necessary to capture the bishops or rooks to win) or (3) achieve a position in which it is your opponent's turn to move, but your opponent has no legal move and you do.
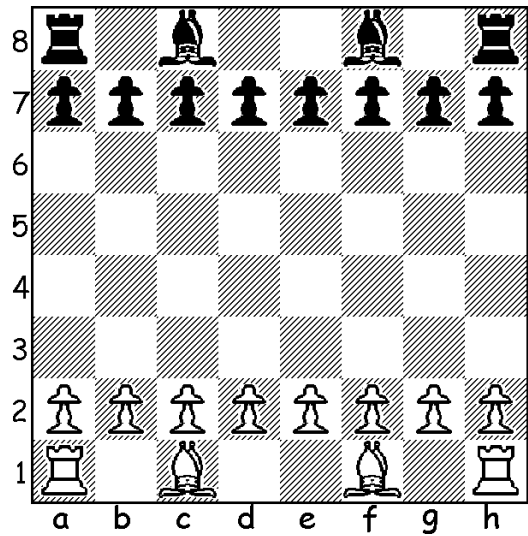
**Practice
(Competitive
Reinforcement)**

It is very important for students to practice many games with the rooks, bishops and pawns. They must become very comfortable with the properties, strengths, differences and strategies of each.

The teacher should insert each of the lessons in short segments interrupting students' games but allowing the majority of time for students to play.

**PART 4: IDEAS
WITH ROOKS
AND PAWNS**
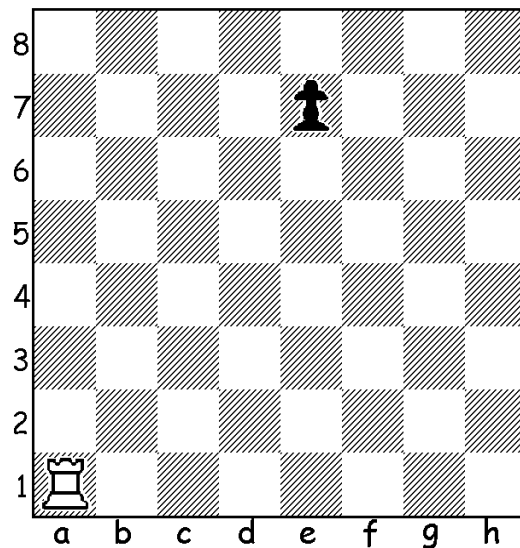
Set up the diagram at left, and have students move the rook so that it will ultimately capture the advancing pawn.

Attacking from the side does not win as quickly as placing the rook along the file on which the pawn is placed, then capturing it.

Now set up the diagram at right and repeat the exercise. The rook should be able to defeat the two pawns so that neither pawn reaches the last rank safely. In this case, however, the quickest way to win is to start by placing the rook along the rank on which both pawns are placed, then capturing one of the pawns on the next turn, then moving the rook behind the remaining pawn and capturing it on the fourth move.
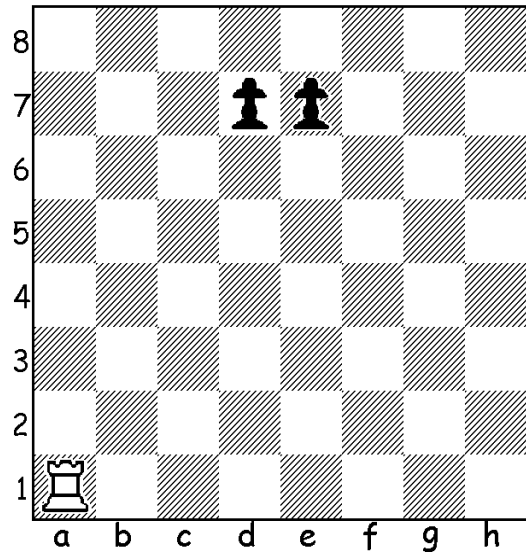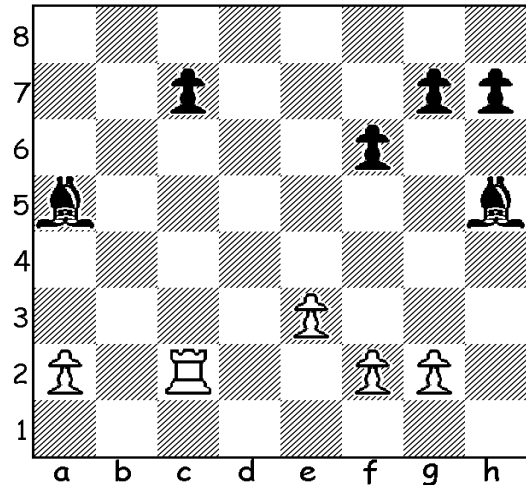
PART 5: TACTICS

Students will find many useful strategies to win games.

forks

A fork is when one man is attacking more than one man at a time. Any piece maybe used to create a fork. In the position on the right, ask the students what White's best move would be.

Think about what the other side will do

Capturing the pawn on c7 looks inviting, but students must consider what their opponent's reaction would be. In this case, it probably would be to capture the rook with the bishop lurking on a5. White also could move a pawn forward. While that may not be a bad move, it is not the best choice, either. The best choice is to move the rook to c5, attacking both bishops simultaneously. Attacking two bishops at the same time is known as a **fork**.

If black moves one bishop into safety, there will be another to capture. Making two threats at once is better than making one threat at a time.

Discovered attacks
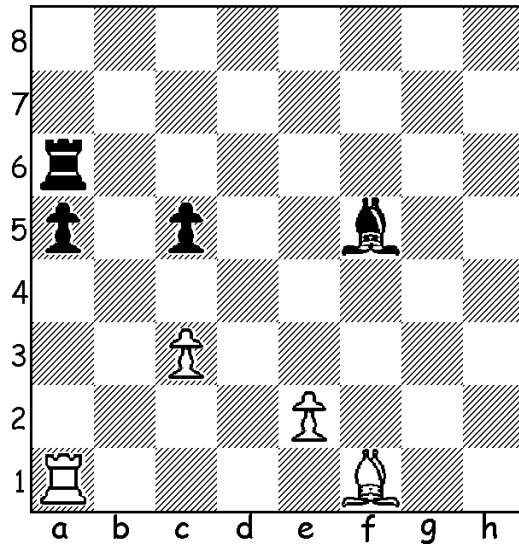
Set up the position on the left. It is White's turn to move. What is White's best strategy?

White has many reasonable choices. Two bad moves are R x a5 (giving away a rook for a pawn) and Rb1 (where it may be captured for free by the bishop.) Other moves could be good but not best.

The best choice is moving the pawn from e2 – e4. That move attacks both the bishop and rook at the same time. The bishop had been blocked from capturing the rook but is not blocked now. Moving one man to create an attack with a piece behind it is known as a **discovered attack**. These can be very powerful.

In this case, the pawn is attacking the bishop while White's bishop is attacking the rook. Black may move either piece to escape the attack but may not move them both.

If Black's bishop captures the pawn on e4, White's bishop will capture the rook on a6. On the following move, White's rook will capture the newly unprotected pawn on a5. So long as White does not make the mistake of giving away the rook or of moving the pawn that is safely on c3, White will win the game, and should win the game very quickly.

A fork

If Black moves the bishop back to c8 to protect the rook, White will capture the rook on a6 anyway. (See diagram.)

After Black captures the bishop on a6, what is White's best move? Again, the best choice is to capture the pawn on a5 which no longer is protected. This position allows the teacher to review the concept of **fork**
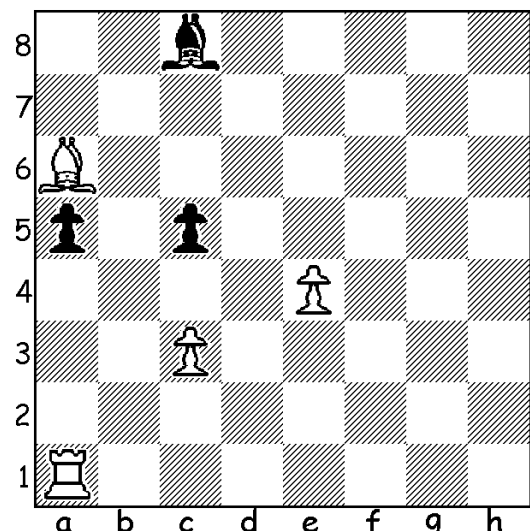
because when White captures the pawn on a5 the rook is attacking both the bishop and the pawn.

Relative value of rooks and bishops

What is more powerful, the rook or the bishop? Because they have different properties, there will be times when having a bishop would be more useful than having a rook. Usually, however, a rook is more powerful. Why is that?

Rooks control more squares

First, a rook controls more squares than a bishop. Place a bishop on an empty board and ask how many squares it controls if nothing is blocking it. The answer will be 7, 9, 11 or 13 depending on how close to the center you place it.
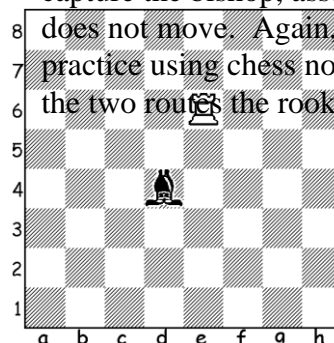
Now place a rook anywhere on the board and ask how many squares it controls if nothing is blocking it. It controls 14 squares from anywhere. So the students can see that a rook may control up to twice as many squares as a bishop, and controls more squares even when a bishop is placed at its most advantageous position.

Now set up the position on the left. Ask how many turns it will take the bishop to capture the rook if the rook does not move. Have the students use chess notation to explain either of the two methods of capturing the rook (1.Bc4 then to e6, or
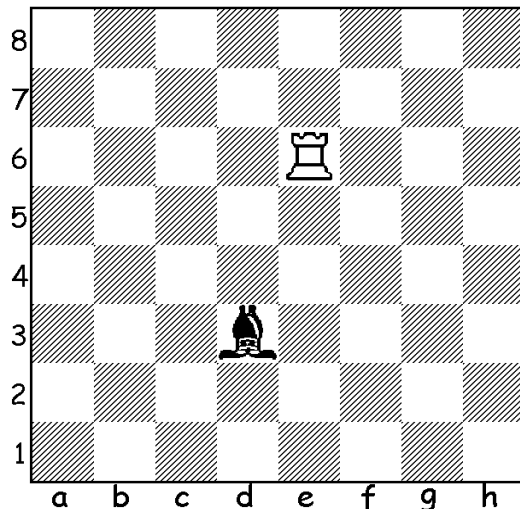
2.Bf5 then to e6.)

Ask how many turns it will take the rook to capture the bishop, assuming the bishop does not move. Again, have the students practice using chess notation by explaining the two routes the rook has to capture the bishop (1.Re3 then to d3, or 2.Rd6 then to d3.)

Now change the position of the rook or bishop by just one square, an example of which is on the right.

Rooks control both color squares, bishops just one.

It still takes just two turns for the rook to capture the bishop, but the bishop will never capture the rook, as the rook is on the opposite color square from the bishop.

Whereas a rook can get to any square on the board, a bishop is limited to moving on just one color square.

How rooks may be more powerful than bishops

Now we have two reasons for believing that rooks are more powerful than bishops, in general.

Set up the position on the right. Tell the students that in this game the rules are different. Pawns may neither capture nor be captured.

The object in this game is for White to move first and to capture the Black bishop. The object for the black bishop is just to avoid being captured.
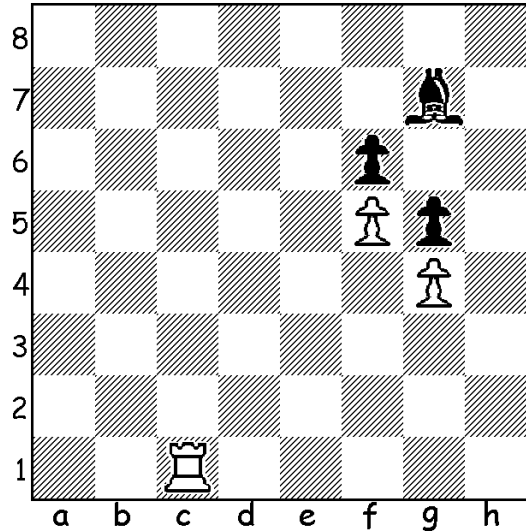
Making a plan

If White's move does not control the f8 square, Black should move its bishop to f8 and then out into the open, making sure that it does not stop on a square controlled by the rook.

White needs to figure out where black wants to move its bishop, then plan ahead to keep it under control. The quickest way to win is for White to move Rc8. Black has three possible moves for the bishop. If the bishop moves to f8 or h8 it gets captured by the rook. So it moves to h6.

White's best move is moving Rg8, controlling both squares where Black may then move. White captures the bishop as it moves to either square.

It is best for the students to figure all of this out for themselves. The teacher should do little more than play the Black side, moving Bf8 and then out into the open while allowing students to try to win.

**Practical tactics
Planning ahead**
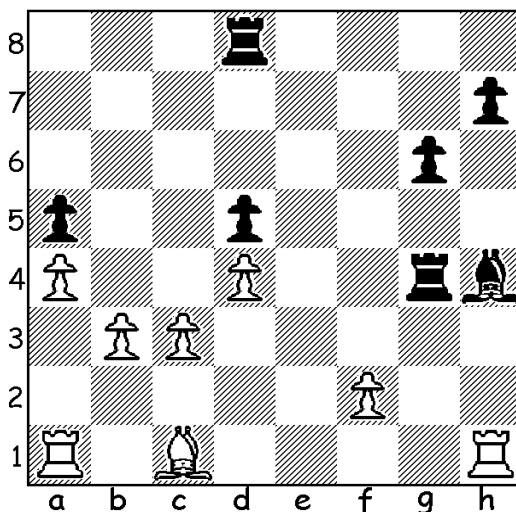
Set up the position on the left. Tell the students it is White's turn to move and ask what would be the best strategy.

White has many reasonable options. This is a complex position. Moving pieces where they may be captured for free generally is bad strategy. But looking for a useful sacrifice should be encouraged.

Combination

In this case, the best move is to play R x h4. While the more powerful rook is being given up for a bishop, after Black plays R x h4 it is White's turn again. What is white's best move? Bg5 **forks** the two rooks. At the end of this sequence of moves (a **combination**, as it is known by chess players) White is ahead by a bishop. An extra bishop in a complicated position like this should be a winning advantage.

**Rooks best
position**

Ask the students while they are playing to figure out where rooks are most powerful and if it is best to bring them forward early or if it is better to have them wait until later.

With bishops, the students should remember that they determined that it was best to bring them out early and have them head towards the center where they are powerful. Rooks are different.

**Rooks should not
be used early**
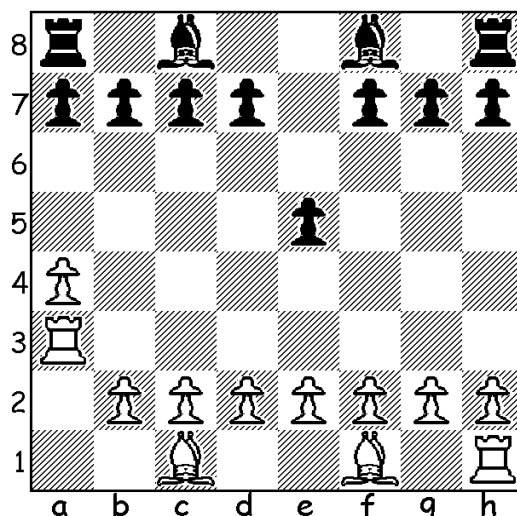
White has made the mistake of bringing the rook out early. What is Black's best response?

Capturing the rook on a3 with the bishop on f8 is a very good trade for Black.

White's decision to move the rook early was not a good one.

To help the students figure out how best to use the rooks, set up the position on the right.

Ask the students to think of themselves as the White side. Ask them on which empty square they would want to have a rook if it was then black's turn to move.

Many suggestions are reasonable, including placing it along the fourth or fifth rank where it can move in four directions and, if it is not on the d- or e-files, attacking a pawn.
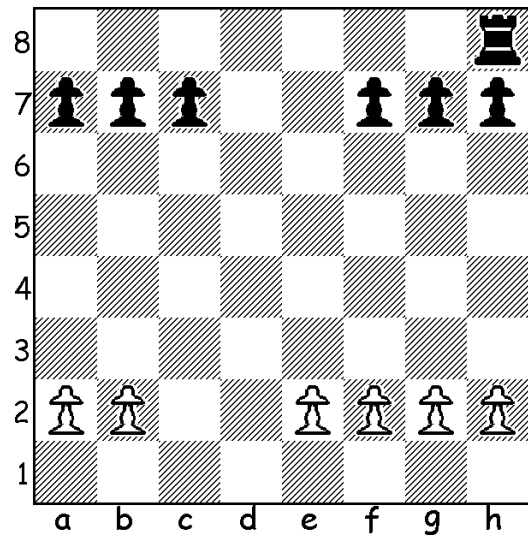
However, if the rook is attacking a pawn from along a file the pawn can defend itself by moving up one square (where it is protected by a pawn on an adjacent file) or by moving the rook behind the attacked pawn.

However, if the rook is placed on the seventh rank it attacks more than one pawn. What is that called? A **fork**. If one pawn is defended, at least one other may be captured.

Rooks are powerful on the seventh rank

In most games, several pawns will not have moved. Where are the rooks most powerful? As the students will have reinforced when they are playing real chess, rooks are very powerful on the seventh rank, the rank on which the opponent's pawns begin.

Open file

How should the rook get to the seventh rank? Ask the students for a good term for a file on which there are no pawns. Chess players refer to such files as **open**. What do chess players called the opposite kind of file, on which there are pawns of both colors?

Closed file

Files with pawns of both colors on them are known as closed files.

Rooks are most powerful on the seventh rank and on open files.

Where are rooks better placed? Because they can control more squares where pawns do not block them, rooks are usually better on open files. Once on an open file, a rook may be able to move safely to the seventh rank, or to other ranks if a good strategy calls for that.

In summary, rooks are usually most powerful on the seventh rank and on open files.

Rooks usually do not move early in the game

In the starting position, how many open files are there? There are not any. It is not until pawns are traded that open files are created.

Usually, it is best to wait until there are open files to move the rooks, as it is only then that a player knows where it is best to place the rooks. Moving the rooks earlier than that is just a waste of time.