The British Horse Society

STAGE 4

TRAINER GUIDE

Career Pathways

INTRODUCTION

This guide is divided into 5 sections:

SECTION 1
Unit 1: Stage 4 Senior Care

SECTION 2
Unit 2: Stage 4 Senior Management

SECTION 3
Unit 3: Stage 4 Senior Lunge

SECTION 4
Unit 4: Stage 4 Senior Ride for Training Eventing
Unit 5: Stage 4 Senior Ride for Training Dressage
Unit 6: Stage 4 Senior Ride for Training Show Jumping

SECTION 5
Unit 7: Coaching Eventing
Unit 8: Coaching Dressage
Unit 9: Coaching Show Jumping

TOP TIP

Training for trainers events are hosted by the BHS via face to face sessions and conference calls. You will need to attend one of these events to be listed as an Accredited Trainer for Stage 4 and be eligible to sign off this Skills Record. Visit www.bhs.org.uk/for-our-coaches-and-centres/helping-with-bhs-training/become-a-trainer/ for more information.

Your role as a trainer is to ensure learners are competent with all the criteria in the syllabus. Your training should cover the complete specification. Learners should also be encouraged to self-study, practise and gain work experience to be able to draw down answers from their own experiences. You also have responsibility to complete the learner's **Ready for Assessment and Trainer Endorsement** forms within the learner's Skills Record. You and the learner should allow sufficient time to complete these before the learner's assessment. The learner should have their own Skills Record for you to sign. We recommend that you keep a record of learners that you have signed off and applicable dates for your own records.

This trainer guide has been designed to support you as you train and support learners and sign-off the Stage 4 Skills Record. An example of the level and depth of knowledge required for each theory based learning outcome is provided. These examples typically cover only one element of each assessment criteria, prior to signing a candidate's Skills Record off you should be confident they can provide this level and depth of knowledge for each point listed in the assessment criteria.

TOP TIP

We strongly recommend the learner's Skills Record is completed before the learner books their assessment.

LEARNERS ARE REQUIRED TO TAKE THEIR COMPLETED SKILLS RECORD TO THEIR ASSESSMENT.

Failure to do so will result in the learner being unable to take the assessment.

RESOURCES AVAILABLE

If you would like a Skills Record for your own reference, a copy can be downloaded free from our website (www.bhs.org.uk/careers-recreational-awards/assessments-information/skills-record), or you can purchase a hard-copy for £5 by calling the Education Team on 02476840508.

The Skills Record can only be signed off by a Stage 4 Accredited Trainer. This is someone who:

- ✓ Is an Accredited Professional
- ✓ Has achieved Performance level in the area they are signing off (e.g. Stable Managers or Performance Care and Welfare to sign off Stage 4 Care). Please refer to the details at the start of each section which specify the units or qualifications required for sign off.
- ✓ Has a teaching or coaching qualification, or Ride Leader Level 2,
- ✓ Has a thorough knowledge of the revised assessment process (having completed a conference call to confirm the standards and procedure).

To sign off the Skills Record, the Stage 4 Accredited Trainer should be able to:

- ✓ Recognise when the learner is working at Stage 4 level
- ✓ Have a thorough knowledge of the breadth and depth of the current Stage 4 assessment criteria
- ✓ Understand the expectations of industry requirements
- ✓ Differentiate between Skills Record sign-off requirements
  - Ready for assessment
  - Trainer endorsement
- ✓ Understand the differences in the relevant command verbs as part of the assessment criteria.

RESOURCES AVAILABLE

All of the current Stage 4 syllabus can be downloaded from the website or the Accredited Professional hub (free resource for APCs and Approved Centre Proprietors)

COMPLETING THE SKILLS RECORD

If you meet the above criteria you can sign off the learner's Skills Record for Stage 4. A **Ready for Assessment** or **Trainer Endorsement** can be signed off on a continuous basis. Within the **Trainer Endorsement** forms you will note the 'date achieved' for each learning outcome within the form, and also add any feedback for the learner should you wish.

Ready for Assessment

The learning outcomes that will be assessed on the day require a **Ready for Assessment** sign off from the trainer to state the learner is working safely and competently at the correct level. This does not mean they will necessarily be successful in passing the assessment on the day.

Trainer Endorsement

Due to the breadth of content within the Stage 4 units, some of the criteria is required to be signed off by the trainer prior to the assessment day. The trainer should question the learner throughout their training to confirm knowledge and understanding of the criteria. It is strongly advised that this process takes place separately to a training session. Only when the trainer is satisfied the learner has met the criteria should the **Trainer Endorsement** be signed. Trainers should ensure the full breadth of the assessment criteria is covered, this is described in the guidance column of the specification and throughout this trainer guide. Where a range is mentioned in the specification this is for the purposes of the viva on the assessment day. On the assessment day the learner will be required to undertake a viva (verbal check of knowledge) with the assessor selecting criteria at random to confirm thorough understanding of the topic.

QUALITY ASSURANCE OF TRAINING

As the trainer is required to sign off competency for some learning outcomes via a Trainer Endorsement the BHS is required to quality assure this training and assessment. If a learner fails a viva on their assessment day, the learner will be required to resit the entire learning outcome with a BHS assessor. This can be carried out via a video call. If the reassessment highlights a concern for the training delivered, the BHS will contact the trainer. The trainer will be asked not to sign off any further Skills Records until they have completed further training. The BHS will support the trainer through this process.

COMMAND VERBS

Below is a list of the commonly used command verbs used throughout the Stage 4 units, and their meaning.

VERB	THE LEARNER WILL BE ABLE TO:
Analyse	Break down a complex topic into simpler parts, exploring patterns and explaining significance. Could be strengths, weaknesses, conclusions and often paired with making recommendations.
Assess	Consider several options or arguments and weigh them up to come to a conclusion about their effectiveness or validity. Similar to evaluate, though can be without the measure.
Compare	Identify similarities and differences of the topic.
Demonstrate	Carry out particular activity or skill showing awareness and understanding.
Describe	Paint a picture in words. Give a full description including details of all the relevant features.
Evaluate	Examine the strengths and weaknesses and judge the merits of particular perspectives to come to a conclusion about their success/importance/worth. Evaluation is often against a measure or value.
Explain	Give logical reasons to support a view.
Justify	Give reasons why something is valid. This might reasonably involve discussing and discounting some views or actions. Each view or option will have positives and negatives, but the positives should outweigh the negatives.

TOTAL QUALIFICATION TIME (TQT)

The BHS specifies a total number of hours that it is estimated an average learner will take to complete a qualification: this is the Total Qualification Time (TQT). TQT is a total of Guided Learning Hours (GLH) and self-guided study. This is an estimate provided by the BHS.

BHS Stage 4 qualifications have been designed around the number of hours of guided learning expected for the typical learner (e.g., at Stage 3 level working towards Stage 4). It is important to note that this is a guide. Each learner you train will have a different level of experience and learn at a different pace and may need more or less time than the GLH advised.

GLH and suggested learning hours are indicated for each learning outcome within the Stage 4 units. The TQT will vary depending on the combination of units required for each of the qualifications available within the Stage 4 career pathways. Please refer the the qualification specification for the GLH and TQT for each unit.

	GUIDED LEARNING HOURS (GLH)	SELF-GUIDED STUDY	TOTAL QUALIFICATION TIME (TQT)
Definition	The combined number of supervised training hours a typical learner will need.	The combined number of unsupervised training hours a typical learner will need	The minimum number of hours a typical learner will take to complete a qualification. This includes study time with and without the trainer. It's the combination of GLH plus self-guided study
Trainer led?	Yes	No	N/A
Examples	Lessons Tutorials Online instruction Supervised study Giving feedback Time required to complete the assessment	Private study Revision Reading Independent research Practice	N/A

STAGE 4 QUALIFICATION STRUCTURE

There are several career pathways to follow within the Stage 4 suite of qualifications.

The qualifications within the suite are:
- ✓ Stage 4 Senior Yard Manager
- ✓ Stage 4 Senior Yard Manager with Riding
- ✓ Stage 4 Senior Eventing Coach
- ✓ Stage 4 Senior Dressage Coach
- ✓ Stage 4 Senior Show Jumping Coach
- ✓ Stage 4 Senior Coaching Riders

Each qualification comprises of a combination of compulsory and optional units.
This table shows an overview of the qualifications at Stage 4 and the units required for the achievement of each qualification.

	STAGE 4 SENIOR YARD MANAGER	STAGE 4 SENIOR YARD MANAGER WITH RIDING*	STAGE 4 SENIOR EVENTING COACH**	STAGE 4 SENIOR DRESSAGE COACH **	STAGE 4 SENIOR SHOW JUMPING COACH**	STAGE 4 SENIOR COACHING RIDERS***
Unit 1: Stage 4 Senior Care	C	C	C	C	C	
Unit 2: Stage 4 Senior Management	C	C	C	C	C	
Unit 3: Stage 4 Senior Lunge		C	C	C	C	
Unit 4: Stage 4 Senior Ride for Training Eventing		O	O	O	O	
Unit 5: Stage 4 Senior Ride for Training Dressage		O	O	O		
Unit 6: Stage 4 Senior Ride for Training Show Jumping		O	O		O	
Unit 7: Stage 4 Senior Coaching Eventing			C			O
Unit 8: Stage 4 Senior Coaching Dressage				C		O
Unit 9: Stage 4 Senior Coaching Show Jumping					C	O

C - Compulsory units   O - Optional units

*   Achievement of the Stage 4 Senior Yard Manager with Riding requires completion of the three compulsory units and one optional unit.
**   Achievement of Stage 4 Senior Coach qualifications require completion of the four compulsory units and one optional unit
*** Achievement of Stage 4 Senior Coaching Riders requires completion of one optional unit

SECTION 1
UNIT 1
STAGE 4 SENIOR CARE

To sign off the **Ready for Assessment** and **Trainer Endorsement** forms within the learner's Skills Record for this unit you must have achieved either the Performance Coach BHSI, Performance Section 1: Care and Welfare or Stable Managers qualification. You must also hold a coaching qualification or Ride Leader Level 2.

GENERAL GUIDANCE

Good stable management practice of handling horses, tack and equipment with safety and care, and of skipping out should be followed at all times. The assessor will want to see the learner apply safe and efficient practice when working with any horse, whether mare, gelding, stallion or youngster. The age and/or sex of the horse should be checked, before commencing work, if appropriate.

RESOURCES AVAILABLE

The BHS Complete Horsemanship Volume 4 is available to purchase from the BHS Bookshop www.britishhorseshop.com/collections/bhs-assessments this will cover both Stage 4 and Performance level qualifications.

LO1 Be able to use specialist tack in a safe and efficient manner

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment Criteria 1.1: Maintain safe handling and working procedures for health, safety and welfare

The learner should show regard for health, safety and welfare of self, others and horses throughout all work covered in the learning outcome whilst:

- Handling fit horses in the stable
- Showing respect for the horse and their surroundings
- Awareness of how the horse may react to the task/s
- Safe positioning of tack in and around stable
- Positioning of self and horse for designated task

TOP TIP
The learner must follow safe procedures to show they are aware of how to work around horses they are unfamilair with.

The assessor will observe how the learner handles horses in the stable; their positioning, respect shown for the horse and how observant they are around the horse. Recognition that this is an unknown horse and suitable conduct with regards to this should be shown. For example, care should be taken when putting the bridle on and not tying the horse up with the double bridle on.

Assessment Criteria 1.2: Manage own time efficiently

The learner should work at commercial speed and prioritise tasks appropriately throughout all work within the learning outcome.

For example, when tacking up put the boots on first (before the horse becomes impatient), then the saddle (so the horse's back can warm up before the rider gets on), then the bridle (so you can lead away without tying back up).

Assessment Criteria 1.3: Explain a range of methods of restraint to ensure safety of horse and handler

The learner should be able to **explain** any of the below methods of restraint, to include how and when it is appropriate or inappropriate to use them.

Methods of restraint:
- Bridle
- Control headcollar
- Lunge cavesson
- Skin pinch
- Lip twitch (and unacceptable twitches – ear twitch)
- Chifney
- Stallion chains
- Veterinary prescribed sedative

Example depth and level of knowledge

Control headcollar:
A control headcollar works on a pressure and release system. These are similar to a standard headcollar but they have an extra moveable rope fitted to the nosepiece which will apply additional pressure on the nose when the horse pulls against the lead rope. The pressure is released when the horse stops pulling. There are also rope options available that tighten under the jaw when the horse becomes strong. A control headcollar is usually used with horses that are strong to lead, perhaps being led to the field to be turned out, and young horses where their jaws and teeth have not developed enough for a bridle, but may need more control than a headcollar (colts, for example). In this scenario, a helper to open/close gates would also be beneficial. When selecting a method of restraint the mildest method should be used initially, and, only if this is unsuccessful should a more powerful method be tried. PPE should be worn.

Assessment Criteria 1.4: Select, fit and evaluate tack for different situations

The learner will be presented with a range of tack and equipment of different sizes. They should be able to work efficiently to select tack and equipment appropriate for the horse they are given. If the tack or equipment does not fit they should look to see if it can be adapted or if other items are more suitable.

The learner should be able to put on and fit each of the below items:

Dressage tack:
- Modern comfort bridle
- Variations of nosebands in current use
- Double bridle
- Dressage saddle
- Pad, cloth, numnah
- Girth (including ergonomic)

Show jumping tack:
- Bridle (this can be a double bridle)
- Martingale/breast plate
- Noseband(s)
- Jumping saddle
- Alternative stirrups
- Girth/stud girth, ergonomic
- Spur guard
- Leg protection

Cross country tack:
- Bridle (this can be a double bridle)
- Martingale
- Suitable reins
- Noseband
- Jumping saddle
- Girth/stud girth, ergonomic
- Breast plate (to include five point)
- Leg protection
- Modern safety and comfort stirrups

Endurance/trekking/long distance riding tack:

- Washable or lightweight bridle
- General purpose saddle (synthetic or leather)
- Girth (including ergonomic)
- Modern safety and comfort stirrups
- Seat saver
- Comfortable pad for horse
- Saddle bag
- Coiled leadrope on saddle
- Neck strap

The learner should **evaluate** the tack chosen through discussion to include:

- Consideration of horse welfare
- Effectiveness for purpose
- Consideration of competition rules

Comfort bridles: Learners need to understand the principles of why people use comfort bridles, e.g. knowing about the nerves on the face and how the bridle relates to this.

ℹ️ TOP TIP

The learner will be asked to evaluate and discuss the fit of all the tack and equipment for its suitability and relate to human and horse anatomy.
When asked a question about the fit of the bridle or saddle they should be able to go through each feature of the bridle/saddle and talk about the fit, what have they checked and how they have decided if it fits/doesn't fit. They should be able to discuss this in depth showing confidence.

Saddle: Discussions may include; the size of the saddle, fit of the saddle, fit of the girth e.g. anatomical, tree width, points of tree and pressure points on the horse and horse and human anatomy e.g., a jump saddle's knee roll should accommodate the rider's legs at jump length.

Double bridle: The learner would be expected to check inside the horse's mouth to evaluate the size of bits to use (from the size of tongue/position of upper tushes). The bridle should be put on with care and bits placed correctly. Once the bridle is on the position of the bits should be checked i.e. sitting level in the mouth and not touching the teeth, you should be able to get a little finger either side of the bridoon, and the curb should be slightly narrower (the bridoon should sit a fraction higher than a snaffle would). The curb chain with lip strap should be under the bridoon (not through the rings, in the right place with the curb chain not twisted).

Assessment Criteria 1.5: Evaluate a range of training aids for riding

The BHS does not promote the use of training aids, however we accept they are used and it is important for a coach/groom/yard manager to give appropriate advice with regard to fit and use.

Evaluate through discussion, including:

- Consideration of horse welfare
- Effectiveness for purpose
- Consideration of competition rules

Training aids may include:

- Draw reins
- Bungees
- Market Harborough
- Harbridge
- De Gogue

Example depth and level of knowledge:

Draw reins

Draw reins can be used to give more control to the rider, e.g. for a horse that naps or spins on the road. These consist of a double length rein made of leather, webbing or nylon, with a loop at either end. They may or may not have a buckle. When fitted as draw reins, both loops are fitted to the centre of the girth under the belly, pass together between the front legs and then divide, passing through the bit rings from inside to outside and back to the rider's hands. The draw reins should not be consistently used with a contact, they should only come into play when extra control is required. If the draw reins are used too much or not fitted correctly it is very easy to force the horse into an artificial head carriage with a short neck.
It can appear broken at the fourth vertebra. This can be very difficult to correct later.

Assessment Criteria 1.6: Evaluate use of a range of bits

The learner should be able to **evaluate** the suitability of bits in relation to the anatomy of the horse's mouth, their action and effect on his way of going. Bits to include:

- Snaffles
- Double bridle bits
- Gags
- Pelhams
- Bitless bridles
- Dressage legal bits
- Other bits in common use

Evaluate through discussion, including:
- Consideration of horse welfare
- Effectiveness for purpose
- Consideration of competition rules

Example depth and level of knowledge:

Double bridle bits

It is not normal to mix a fixed curb with a loose ring bridoon as the curb would end up being more severe. The bridoon acts in the same way as a snaffle and the curb has a refining action of putting pressure on the poll and the fulcrum action on the curb groove to bring the head down and round. For a horse that has a tendency to fix its jaw a loose ring and sliding cheek may help with this. A horse that has large tushes may need slightly narrower bits.

Assessment Criteria 1.7: Evaluate leg protection for a range of situations

The learner should show knowledge of leg protection for:

- Cross country
- Show jumping
- Dressage
- Endurance/trekking/riding over a distance
- Turning horses out

The learner should **evaluate** through discussion the positives and negatives of different leg protection to include:

- Consideration of horse welfare
- Effectiveness for purpose
- Consideration of competition rules

Example depth and level of knowledge:

Boots:

Positives: Provide protection and support (if correctly fitted). Speed of application.
Negatives: safety issues if not fitted correctly, after going through water they can become heavy and cause rubbing.

TRAINING TIPS

- ✓ Work experience at different types of yard would give valuable practical experience of handling different types of tack for various disciplines
- ✓ Don't forget the basics with regards

to safety around horses and good practice

✓ Putting on and fitting tack (particularly double bridle) is an area where learners are often weak. Ensure this is practised often and the learner is confident and competent handling all types of tack and discussing its fit. Plenty of practise fitting various types of tack is required

✓ Learners should be confident handling and working around fit competition horses – again, lots of experience is required

✓ Competitions are a great place to observe different types of tack in action. Encourage learners to ask competitors about the tack they have chosen for their horse and why.

LO2 Understand nutritional requirements of horses

🛡 SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to confirm competence.

Assessment Criteria 2.1: Explain nutritional and dietary needs for a range of horses

The learner should be able to **explain** the nutritional requirements of the following horses:
- Show jumping (Foxhunter)
- Dressage (Medium)
- Eventing (Intermediate)
- Endurance / trekking (50 miles / 80km)
- Show horses
- Stallions
- Developing young stock (including fast growing young stock)

Nutritional and dietary needs should include:
- Type of feed
- Bulk to concentrate ratios
- Consideration to the stage of fitness of the horse
- How and when to feed

The learner should know how levels of nutrients, for example, carbohydrates and proteins (% of diet) vary for the range of horses above. They should identify where in the diet changes can be made to provide nutritional requirements (for example, hay approximately 7% protein, haylage is approximately 10% protein). Learners should have a detailed understanding of a diet and nutritional requirements for horses, and how this can be adapted for the various horses above. Also a knowledge of why the diet should be adapted and when (e.g. how close to competition).

ℹ TOP TIP

Learners should be familiar with a range of feeds available on the market. They should be able to provide practical answers based on their experiences of feeding horses.

Example depth and level of knowledge

Dressage:

A dressage horse working at Medium level can be considered to be working within a moderate workload. This would include 4/5 working sessions in the arena each week with supportive hacking and riding out. The diet could be; good quality hay or haylage – 2/3 times daily depending on routine and timings. Some yards may prefer to use haylage as this is not dusty and may be more nutrient dense (i.e. energy, protein). There is choice as to the type of haylage used.

The bucket feed will be made up of high quality fibre. An example would be; fast fibre soaked to manufacturer's guidance mixed with chaff/ready grass or similar prepared brands suitable for the type of horse and its workload. Wherever the feed is primarily bulk, a balancer should be included.

More traditional coarse mixes can be used with the coarse mix being added to chaff or similar prepacked product.

The horse would require a minimum of 2% of bodyweight per day and a maximum of 2.5%.

Vitamins/mineral supplements can be used but may depend of the feed type being used as balancers already offer a balance to the diet.

Any diet should suit the needs of the individual horse which should be monitored continuously with regard to condition, work and general wellbeing.

Assessment Criteria 2.2: Evaluate the use of vitamin and mineral supplements in horses' diets

Evaluation to include:

- Provision of vitamins and minerals within the food ration
- Supplementary feeding, how and when

The learner should be able to discuss when and why vitamin and mineral supplements may be used in horses' diets and evaluate their use.

Example depth and level of knowledge:

- *Supplements are formulated to provide vitamins and minerals to meet the horse's daily recommended intake. If the horse is on the recommended intake of a formulated feed and eating sufficient forage, it is unlikely that an additional supplement would be necessary*
- *Over-supplementation of specific vitamins or minerals can cause toxicity, or a deficiency in another mineral resulting from shared uptake carriers. For example, copper and iron are metabolically linked and an excess of one can cause a deficiency in the other; likewise there are similar antagonistic interactions between Vitamin A and Vitamin D.*

Typical situations where feeding a supplement might be advised may include:

- *Electrolytes for working horses who are sweating*
- *Horses out at grass not being fed any hard feed*
- *Horses on predominantly preserved forage diets being fed less than recommended amounts of complementary feeds*
- *Biotin for horses with poor quality horn*
- *In areas where ground is selenium*

deficient and the horse lives out with no hard feed

- *If a horse is not thriving (blood tests would identify any deficiencies)*
- *Horses on restricted grazing.*

It is important to take care to check the list of ingredients on any tub of supplements and look at the analytical composition to see what it contains. Vitamin E is one of the most expensive ingredients and provides a good indication of the quality of the supplement. You should also check the recommended dose to see how many grams per day you will need to feed each particular horse, so that you can then compare products accurately.

Assessment Criteria 2.3: Analyse the management of a range of health conditions that may be linked to nutrition

The learner should be able to **analyse** the management of the health conditions listed.

Analyse by identifying several relevant factors, show how they are linked and explain the importance of each. Management factors could include:

- How the condition may be linked to poor nutrition
- Diet
- Turnout vs stabling
- Exercise
- Routine

Health conditions to include:

- Exertional Rhabdomyolysis (ER) (tying up)
- Lymphangitis
- Filled legs
- Equine Metabolic Syndrome (EMS) (diabetes)
- Gastric ulcers
- Colic
- Laminitis

- Obesity
- Developmental Orthopaedic Disease (DOD)
- Dehydration

Example depth and level of knowledge

Laminitis:
There are other causes of laminitis not just nutrition. However if a horse is overfed they are at a greater risk of developing laminitis.

The frequency of a diagnosis of laminitis rises in the UK every year and there is a positive correlation between increasing body fat score and laminitis, with a cresty neck being significantly associated with chronic and acute laminitis.

If horses are fed too much, they lay down fat that is metabolically active. This metabolically active fat causes changes in the way the horse's metabolism works, increasing chronic inflammation, insulin resistance and changing the lining of blood vessels. An overweight horse is in poor condition and is not fit for purpose, which is a welfare issue.

Managing a horse to prevent laminitis means keeping them lean. This is done by maintaining bulk intake, reducing calories, balancing vitamins and minerals and increasing exercise that will result in fat loss and muscle development. Keeping horses turned out muzzled (no more than 12 hours at a time, then stabled) or providing soaked hay will reduce calorie intake, and clipping in winter and using thin rugs purely to keep horses dry (only if needed) rather than to insulate will also facilitate fat loss. It is essential a horse is slightly underweight/lean going into spring, rather than overweight, as this is when grass is most nutrient dense. In winter, frosty grass can also be a trigger for a laminitic episode so careful management of

limited turnout early in mornings/overnight is recommended. EMS can trigger other health conditions such as Laminitis.

TRAINING TIPS

✓ Although this is assessed as a theory unit, the learner should have a working knowledge of nutrition and planning and maintaining horses diets so they can draw down from their own experiences

✓ Experience at different types of competition yard with horses at various levels of training will be beneficial

LO3 Understand the management of competition horses

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to confirm competence.

Assessment criteria 3.1: Analyse the management of competition horses pre, during and post competition

The learner should be able to **analyse** the overall management of competition horses before, during and after competition. For the purposes of this question, 'pre' and 'post' competition is defined as the week prior to and after competition. The competition is within the country the horse is based but may require several hours of travel. It could be a one-day competition or three-day event.

The learner should be able to **analyse** by identifying several factors, explain how they are linked and the importance of each. Factors could include:

Pre competition:
- Daily routine
- Use of popular management techniques and equipment (for example, massage, massage pads, stretching, magnetic therapy, hydro treatments)
- Workload
- Transportation within home based country (regulations, passport and relevant paperwork)
- Routine and care of horse upon arrival
- Equine anti-doping guidelines
- Clean sport
- Testing procedures

During competition:
- Grooming and presentation of horse
- Feeding, hydration
- Care and management techniques at a competition
- Cooling off and care of legs after competition (ice boots, hosing)
- Checking for injury
- Stabling away from home

Post competition:
- Checking for injury (strains, pulls etc)
- Routine, turnout
- Use of popular management techniques and equipment (for example, massage, massage pads, stretching, magnetic therapy, hydro treatments)

Example depth and level of knowledge

Pre-competition:
Routine:
Ideally the routine should stay the same as much as possible. You may want to reduce workload in the run up to a competition. You may also wish to vary the type of work e.g. you may hack a dressage horse the day before a competition so they are not stale for the test. Work depends on the temperament of the horse, generally speaking, try not to do too much heavy work a few days before the competition in order to allow the horse to conserve energy and reduce the risk of injury. However, a highly strung or excitable horse may need extra work to take the edge off. If the weather is likely to be hot you may begin to give the horse electrolytes.

Preparation for travelling:
Stock the lorry with food, water, bedding, veterinary products (for example, first aid kit) as well as the horse's equipment and tack (including fly spray, sunblock etc). You may take water for the whole time away, or use the water there, this depends on whether the horse will drink water away from home (sometimes flavouring the water may be required). You will require the horse's passport and may require a certificate of competence (if you're travelling a horse for financial gain you must comply with transporting horses regulations).

Transport of horse:
When travelling you will need to consider; whether to travel horses with hay or without hay, type of leg protection, the temperature of the vehicle (air flow), rug (if required) and hydration/electrolytes (depending on sweating). Check travel times/journey and try to travel outside of peak times, this reduces the journey time and the potential dehydration of the horse. Ensure you have the breakdown cover contact details with you in the vehicle.

Arrival:
You will be required to present the passport to the organiser before unloading. Offer the horse a drink and take him for a walk/graze. Depending on your time of arrival you may wish to ride the horse before bedding it down. If the stable is on grass, let horse graze it first before putting the bed down as this prevents the horse trying to eat the bedding to get the to grass. Give the horse sufficient food and water for the night. Contact details should be visibly displayed on the stable. Check the horse periodically to check he has settled in.

Assessment criteria 3.2: Evaluate the different fitness processes required for a range of performance horses

The learner should be able to **evaluate** the different processes for getting the following horses fit for competition:
- Show jumping (foxhunter)
- Dressage (medium)
- Eventing (intermediate)
- Endurance / trekking (50 miles / 80km)
- Show horses

Fitness processes to include:
- Interval training
- Traditional methods
- Fitness programs
- Swimming
- Treadmill
- Gallops

Example depth and level of knowledge

Dressage horse:

A dressage horse requires a variety of work within a fitness programme to maintain suppleness. This could include; hacking out, work over different surfaces including undulating ground and up and down hills. It is important to work on different surfaces which may be reflective of different competition venues. The intensity of the work should be in line with the level of competition. Medium dressage: schooling sessions may be up to 45 minutes, working towards the horse being able to trot and canter consistently for blocks of 15 minutes.

Dressage horses may benefit from pole work and grid work to help suppleness in addition to flat schooling. Competitions can also be used as part of a fitness plan. An event horse would require a higher level of aerobic fitness; this often includes canter work which may be covered using interval training. For example, three five minute canter sessions with three minutes of walk in between, every four days. Interval training should be done using heart rate monitors where possible. The horse should be trained to stay fit enough to keep his heart rate under an acceptable level (approximately 160bpm) to prevent the build-up of lactic acid. Heart rate monitors can also be used to check recovery of the horse. The speed will depend on the terrain (flat vs hills). Competitions can be used as part of this too.

TRAINING TIPS

✓ Although this is assessed as a theory unit, the learner should have a working knowledge of caring for competition horses

✓ Experience should cover different disciplines

✓ Experience at different types of competition yard with horses at various levels of training will be beneficial

LO4 Be able to maintain a horse's physical wellbeing

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment Criteria 4.1: Assess a horse's static conformation and physical condition

The learner will be required to **assess** a horse. They should show respect and consideration for the horse and handler during their assessment. The learner will be asked to **assess** a horse taking into consideration the horse's; type, size, sex, age, and evaluate the type of work they consider the horse is suited for.

TOP TIP

Assessment criteria 4.1 and 4.2 are likely to be assessed at the same time and the learner expected to discuss both before assessing the dynamic conformation.

Static conformation:
- Ageing the horse
- Bone structure (length of bone/angles)
- Strengths and weaknesses relating to the frame and covering muscular structure
- Dividing horse into sections
- How proportion and balance influence soundness and the ride

Physical condition:
- Condition scoring
- Level of fitness
- Muscular development

- TPR – will not need to take TPR but understand how it could be used to evaluate the condition
- Skin conditions (sarcoids/sweet itch/melanoma)
- Hoof condition

TPR: Observe the horse and talk about how it could be used to evaluate physical condition (resting rates, time taken to recover etc.) or you might notice something in the breathing that isn't quite right (i.e. quick and shallow).The learner will be expected to assess the horse on each of the points above. They should be able to discuss this with the assessor with few prompts. From the static assessment they should be able to discuss with the assessor how they think the horse might move during the walk and trot up.

Assessment Criteria 4.2: Analyse a horse's lower leg and foot balance

The learner will be asked to assess the structure of the horse's lower legs and **analyse** foot balance.
Analysis to include:
- Front and hind
- Conformation of limbs (if present, identification of; bone spavin, bog spavin, thoroughpin, curb, windgalls, splints)
- Relationship of hoof pastern axis
- Foot balance implications and conditions (ringbone, sidebone, navicular disease, windgalls, splints)
- Signs of previous injury

The learner should be able to **analyse** the static conformation and foot balance of the horse in front of them and how they would expect this to affect the horse's dynamic conformation.

The learner may be given a scenario to discuss if the horse given on the day does not present with any conditions/implications.

Assessment Criteria 4.3: Assess a horse's dynamic conformation

The learner will be presented with a horse to **assess**. They should show respect and consideration for the horse and handler during their assessment, manage the situation politely, instruct the handler clearly and follow the correct process for trotting up.

The learner should be asked to **assess** the horse to include:
- Walk in hand
- Trot in hand
- Turning and reversing
- Flexion test (discussion only)
- Lungeing for soundness (discussion only)
- Quality of movement
- Soundness in gait
- Foot balance implications
- Relate to static conformation

The learner should be able to discuss the quality of movement, if the horse is sound or not, and notice and discuss any deviations in movement.

Assessment Criteria 4.4: Explain how a range of remedial equipment would be used in the prevention or rehabilitation of lameness

The learner should be able to **explain** how the equipment below can be used in the rehabilitation of lameness.

Remedial equipment to include:
- Standard shoe
- Rolled toe shoe
- Support shoe
- Raised heel shoe
- Bar shoe
- Heart bar shoe
- Glue-on shoe
- Gel pads – silicon / impression materials
- The use and fitting of hoof boots for unshod horses

Example depth and level of knowledge

Heart bar shoe:

A heart bar shoe could be used for the treatment of laminitis. The shoe continues at the top (where the gap would usually be on a conventional shoe) and has a heart shaped pad which covers the frog. The heart shape shouldn't go beyond the length of the frog. The purpose of the heart shape is to support the pedal bone and improve circulation. If the horse finds it too painful for the heart bar shoe to be nailed on they could have pads taped to the feet instead or gauze with setting gel that covers the sole of the foot (for example, Equi-pak). Supporting the foot in this way helps to hold the laminae in place to prevent separation. When a horse has laminitis it is important the farrier trims the foot appropriately to keep the toe short.

Assessment Criteria 4.5: Analyse the use of current bandaging methods

Analyse the use of the following bandages by explaining:

- How to apply
- Why they may be used
- Length of use and how often
- Potential issues of use
- Occasions when a method may not be suitable

Bandaging methods:
- Support
- Pressure
- Stable
- Foot

Example level and depth of knowledge

Hock bandage:

This may be used for example if a horse is bleeding from a wound on the hock. You could apply a hock bandage whilst you wait for the vet. The fibergee or Gamgee should be large enough to go over the joint and then bandage in a figure of eight with a cohesive bandage. The tension of the bandage should be checked, when applying don't pull tight, roll the bandage around the limb, and once completed check with a finger at the top and bottom. You can also apply a support/ stable bandage to encourage circulation in the lower limb. If the hock bandage is being worn in the stable overnight this can be removed as required to check for filling. Also put a support bandage on the other leg. If a hock bandage is being worn for longer periods, follow the vet's advice for the length of time. Bandages should only be applied for as long as necessary and on occasions when needed. With elastic and cohesive bandages there is a risk they may be put on too tight. If the bandage is applied too tight and/or there is insufficient padding this could result in too much pressure being applied. This can restrict or in severe cases cut off the circulation to lower leg. Incorrect bandaging can result in injury and future scarring/white marks on the legs.

Assessment Criteria 4.6 Select and apply a suitable foot dressing or a figure of eight bandage

The learner should select equipment and apply:

- A foot dressing with poultice (or substitute) and suitable bandages and duct tape

  or

- A figure of eight bandage for wound protection

ⓘ TOP TIP

The learner should be efficient and complete this in five minutes, from selection of suitable equipment to completion.

Hock bandage:
Equipment provided: Gamgee or fibergee, elastic bandages, stable bandages, duct tape and wound dressings.
Process: Place the fibergee or gamgee around the joint (large enough piece), apply the bandage in a figure of eight using an elastic bandage (this may be used instead of a cohesive bandage for purposes of demonstration), a stable bandage should also be applied to ensure circulation in the lower limb. Put a support bandage on the other leg.

Foot poultice: This can be demonstrated using an elastic bandage, (in practice duct tape would be used). Duct tape is attached to the hoof wall around the heel and sole of the foot. If attached above the coronary band it should be cut to ensure circulation to the foot.

Assessment Criteria 4.7: Explain the function of a range of muscle groups

The learner should be able to **explain** the role of various muscles and **explain** the function with regards to locomotion and gait (i.e. which part of the horse moves and how).

Muscle groups:
- Quarters
- Back
- Shoulders
- Neck and top line
- Abdominal

> **ℹ TOP TIP**
>
> The learner should be able to show on the horse where the individual muscles are and name the major muscles within that group. The learner should be able to explain which muscles pull and which muscles push.

Example level and depth of knowledge

Quarters
When galloping:
Biceps femoris, semitendinosus and semimembranosus - Powerfully extend the hips and propel the horse forward. Medial gluteal - Provides power for hip extension but also helps raise the forehand.

When jumping:
Medial gluteal, hamstrings, gastrocnemius and quadriceps - Provide the power at take-off to propel the horse into the air when the horse is jumping.

Jumping and dressage:
Superficial gluteal and biceps femoris. Maintain lateral stability behind, particularly important during collection, lateral exercises and at take-off.

Assessment Criteria 4.8: Explain the role of the main tendons and ligaments in the lower leg.

The learner will identify the relevant tendons and ligaments in the lower leg and **explain** basic function in locomotion.

To include:
- Front and hind lower leg
- Flexor and extensor tendons
- Annular, check and suspensory ligaments
- Connection to muscle (going to top of leg) and bone structure

Example level and depth of knowledge

Suspensory ligament:
Ligaments connect bone to bone across joints. They differ from tendons in not being part of a muscle. They support the joint and prevent it from over-extending, over-flexing or over-rotating.

The suspensory ligament runs down the back of the leg and plays a major role in the support of the fetlock. It functions more like a tendon in that it can stretch and recoil. For example, when the fetlock is on the ground, the suspensory ligament stretches; it then recoils as the leg leaves the ground. Repetitions of the stretch and recoil can lead to repetitive strain injury in this ligament.

Assessment Criteria 4.9: Explain a range of common injuries to tendons and ligaments and their treatment

Learners should be able to **explain** common injuries to tendons and ligaments (flexor, extensor, suspensory, check and collateral ligament damage) and their treatment.

Common injuries:
- Sprain / pull
- Strain / tear
- Laceration

Example level and depth of knowledge:

An injury would present itself via heat and swelling of the affected area. Lameness can range from mild to severe depending on the severity of the injury. If any injury is suspected, call your vet at the time of injury. Depending on the level of lameness they may need to examine the horse as a matter of urgency to rule out any concurrent trauma e.g. fracture. Follow the vets advice this may include anti-inflammatory medication, cold hosing, initial box rest, walking out in hand and long term rehabilitation. Bandaging may be advised in certain cases. Further treatment could include shockwave therapy and/or stem cell therapy depending on the nature of the injury.

Assessment Criteria 4.10: Explain how to prevent injuries to tendons and ligaments

Learners should be able to **explain** what can be done to prevent injuries to tendon and ligaments.

Prevention to include the importance of:
- Adjusting work to ground conditions
- Correct warm up and cool down
- Inspection and care of legs after competition
- Injuries more commonly seen in specific disciplines
- Fitness and initial work in fitness program

Example level and depth of knowledge:

Cold tendons are less pliable and more prone to injury than warm ones, so the horse should be warmed up gradually for exercise. Tendons are more susceptible to injury when they have a high core temperature. Excessive heat generated by bandages or protective leg gear can cause the core tendon temperature to rise to as much as ~47⊡C. So it is prudent to avoid using bandages for a prolonged period or if the horse is engaged in fast work. Bandages increase the heat within the structures, thus increasing the time it takes to cool the legs, so using well-ventilated boots that allow efficient convection and cooling of the lower legs during more strenuous exercise is advised.

Become familiar with all the horses' legs in your care. Feel them every day to detect early signs of change, heat or swelling. After exercise remove boots and check the legs. After any type of strenuous exercise actively cool the legs as soon as it is safe to do so. There are many options for doing this, these may include; cold hosing and various ice/cool boots.

Continue to check the legs for any signs of heat or swelling after work.

Assessment Criteria 4.11: Explain a range of common treatments and therapies

Learners should be able to explain why the treatments and therapies below may be used and **explain** their benefit:

- Veterinary intervention
- Treadmill
- Heat lamps or pads
- Stretching
- Circulatory treatments (massage, shockwave, magnetic, ultra sound, TENS, etc.)
- Care of legs
- Hydro treatments
- Rehabilitation work
- Walking in hand and under saddle
- Cold and warm treatment

ℹ️ TOP TIP

Encourage the learner to watch the treatments or therapies in action. For example, ask to visit a yard with a treadmill and volunteer for the day.

Example level and depth of knowledge

Treadmill:
Equine treadmills offer an array of benefits, they come with a control panel allowing variations in speed and gradient depending on the intended goal. Treadmills are claimed to be particularly beneficial for straightness training, as well as being a good tool for rehabilitation. A treadmill offers a flat, specially designed surface that is suggested can reduce ground force reaction through the horse's limbs compared to normal ground exercise, thus reducing the risk of injury.

A treadmill offers a range of uses, including:

- *They make it possible to exercise a horse if the arena is flooded, deep or out of use and options such as roadwork are also reduced*
- *They are an alternative to a horse-walker for exercising horses when turnout is limited*
- *They offer an alternative modality on which to exercise a horse to reduce the risk of repetitive injury*
- *They can be programmed to adjust speed and gradient, which can give more options for working different muscle groups, and challenging the cardiovascular and respiratory systems*
- *They are a means of exercising a horse in straight lines to improve straightness*
- *They are a means of exercising a horse without the weight of the rider.*

TRAINING TIPS

✓ Extensive practical training and experience is crucial to successfully complete this learning outcome

✓ Training should cover assessing horses that have both good and poor conformation, learners should be confident talking about the horse's condition

✓ Encourage the learner to shadow an equine dental technician or vet to gain experience ageing horses

LO5 Understand the care of horses

🛡️ SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 5.1: Explain how to maintain health and wellbeing of horses

The learner should be able to **explain** how to maintain horse health by addressing the following:

- Horse welfare
- Cleanliness
- Isolation
- Dealing with new horses (psychological wellbeing)
- Contagion and infection, common conditions
- Biosecurity measures
- Recognising hazards
- Risk management
- Health and safety policy
- Ensuring effective communication with all stakeholders

Example depth and level of knowledge

Biosecurity:

- *Biosecurity can be defined as the prevention of the spread of contagious disease*
- *Ideally, as a precautionary measure, new horses onto a yard should be isolated for a minimum of 28 days with their temperature taken twice daily. Yards have their own individual policies, which may be a paddock or stable where the newcomer can see other horses but not touch them*
- *All horses should have up-to-date vaccinations (flu)*

- *Do not share equipment such as tack, grooming kits, water buckets and rugs between horses*
- *Even if you have no reason to believe any horses on the yard are sick, it is good practice to wash your hands between handling different horses, or carry a sanitiser on your belt. If a horse is known to be unwell, more strict isolation and disinfection precautions than this must be taken (do not need to go into detail for this assessment criteria as this is covered in 5.2, however you can link the two if preferred)*
- *All yard visitors should be noted in the yard diary*
- *When away at competition do not let your horse touch unknown horses or share water, upon return the horse should be monitored for any signs of illness. Travel equipment should be cleaned and the trailer or lorry disinfected. Be careful when using pressure hoses, as those with greater than 120psi produce aerosols and can spread infectious agents*
- *Common conditions to look for include equine flu and strangles.*

Assessment Criteria 5.2: Explain procedures for managing a suspected outbreak of a contagious disease

The learner should be able to **explain** how to manage the procedures required on a yard if it is suspected that a horse has a contagious disease.

Procedures to include:

- Symptom identification
- Immediate procedures
- Short, medium and long term action planning

Example depth and level of knowledge

Immediate procedure:

- *Barrier nursing (taking extra precautions*

to try to ensure that the disease cannot spread, including washing hands, wearing overalls and using disinfectants on footwear and stabling). An approved list of disinfectants is available from Defra

- *Any horse showing signs of infectious or contagious disease such as a cough, nasal discharge, fever (above 38.5°C), skin lesions (e.g. ringworm) should be isolated immediately and veterinary advice sought. Where relevant, the horse's owner should be informed*
- *The horse should be placed in strict quarantine and isolated, either in a stable away from the main stabling, or in stabling that can be sectioned off. Likewise, with a field, one could be sectioned off where no other horses could touch the infected horse.*
- *Monitor the temperature of all horses on the yard, ensuring that thermometers are sterilised between horses*
- *Sick horses should not be handled by people who then attend other horses unless full cleaning/washing/disinfecting happens. This should include wearing overalls, washing hands and disinfecting boots*
- *Inform other owners and local yards*
- *Keep a record of dates and names of horses who have had contact with the isolated horse*
- *Implement the traffic light system – colour-code horses into groups (red, amber, green)*

Assessment Criteria 5.3: Evaluate end of life care

The learner should be able to **describe** end of life care to include:

- Assessing quality of life
- Signs that may indicate the need for euthanasia
- Procedure and veterinary intervention
- Carcass disposal
- Passport requirements

> ### ⓘ TOP TIP
>
> Services the learner should be familiar with are Friends at the End (BHS) and Equine End of Life Service (National Fallen Stock Company). Find out more on our website: **https://www. bhs.org.uk/our-work/welfare/our-campaigns/friends-at-the-end**

Example depth and level of knowledge

Assessing quality of life:

Quality of life can be subjective and what one person regards as being acceptable might differ from the view of another. However, there are a number of observations that can help you visualise and monitor all aspects of a horse's life and thereby indicate good or poor quality of life. There is a checklist that can be used when observing a horse on a daily basis, to monitor his condition. Learners should have knowledge of the criteria on this list available on the BHS website **https://www.bhs.org.uk/our-work/ welfare/our-campaigns/friends-at-the-end**

TRAINING TIPS

- ✓ Work experience managing groups of horses should supplement the training for this learning outcome
- ✓ Organisations such as the BHS, British Equestrian Federation, Defra and the Animal Health Trust have lots of information and resources about biosecurity (disease prevention) and if there have been any recent outbreaks
- ✓ There are lots of resources available via the BHS Welfare Team with regards to end of life care **www.bhs.org.uk/advice-and information/horse-ownership/ euthanasia**

LO6 Understand the care of mares and youngstock

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 6.1: Explain how mares in foal should be cared for

The learner should be able to **explain** how to care for a mare in foal throughout pregnancy, to include:

- Feeding
- Turn out
- Vaccinations and worming

Example depth and level of knowledge

Feeding:

- *During this last trimester it will be necessary to increase the mare's nutrition, although by how much will depend on her type. She will definitely require increased levels of protein, and a good source of calcium for optimum foetal development, along with vitamins and minerals. Oil is a good source of essential fatty acids*

- *Whilst the mare requires correct nutrition, and whilst oil/fat can be a useful component of this, it is essential that she does not lay down excess fat, as this can make foaling difficult, and can also cause developmental problems in her foal, particularly to the limbs*

- *There are many proprietary feeds available for the purpose; a stud mix or cube will give correct nutrition and maintain weight, while a stud balancer will give correct nutrition, without weight gain*

- *Good grass throughout pregnancy is recommended and/or ad lib forage. The amount of bulk should be kept high. Keep concentrate feeds small and provide often (if necessary).*

Assessment Criteria 6.2: Describe the signs a mare is due to foal

The learner should be able to **describe** the signs in relation to the horse's:

- Shape
- Udder
- Behaviour
- Muscle tone

Example depth and level of knowledge

Shape: *As the mare reaches approximately 9 months of gestation, her abdomen will start to appear more pendulous.*

Udder: *Approximately 24 hours prior to foaling the mare will wax up. The udder will be completely full. Immediately prior to foaling, colostrum may drip from the teats. Any more discharge than this should be considered abnormal and the vet must be consulted urgently.*

Behaviour: *Changes in behaviour are highly variable between individuals when foaling is imminent. Sometimes she may appear to show sweating and mild colic signs or just be*

unsettled and walk around more. If you have any doubts at this stage, the vet should be notified immediately.

Muscle tone: *Muscle tone decreases prior to foaling, with the muscles in the pelvic area beginning to relax approximately three weeks before parturition.*

Assessment Criteria 6.3: Explain the foaling process

The learner should be able to **explain** the foaling process to include:
- Choice to foal inside or outside
- Normal foaling process
- Identifying problems and when veterinary intervention is required
- Immediate after care (importance of colostrum, passing of meconium, retention of afterbirth)

Example depth and level of knowledge

Choice to foal inside or outside:

Foaling inside. *An adequate-sized foaling box, well-bedded and banked, clear of fixtures, with CCTV is desirable. An automatic waterer, which is out of the way when the foal is born, is ideal; alternatively a water bucket that is soft and will collapse and has no handle is the safer option. Most mares foal without incident, however watching from a distance gives reassurance, and means that if complications do occur help can be at hand.*

Foaling outside. *If the mare is due to foal early or late in the season, the weather may be harsh. Any other companions in the field must be compatible. Ideally, the field should be relatively flat, with fencing that prevents the foal becoming separated from the mare. As most mares foal at night it is difficult to keep an eye on proceedings if foaling takes place in a field. If the mare foals down in the field it may be difficult to catch her afterwards. Native horses and ponies will*

often be foaled outside as they are often more hardy and used to living outdoors.

Assessment Criteria 6.4: Evaluate care options for the mare and foal

The learner should be able to **evaluate** through discussion different options for the care of the mare and foal.
- Stabling
- Turning out
- Handling
- Company of others
- Health checks
- Breed of mare

Example depth and level of knowledge:

Breed of mare:

The type of mare or breed may have a direct influence on how the mare and foal are managed. The available space for turnout, time of year and the nature of the turnout provision are further considerations.

Native breeds will generally do better if managed out of doors. This assumes the turn out area is safe, well fenced and drained and has protection against the worst of the weather. Good grazing is essential, native breeds would usually foal in the spring so there should be sufficient grazing. However attention should still be paid to the condition of the field, an open field with little natural protection poorly drained on clay will provide poor turn out for even the most hardy of breeds. All stock should have as much access to turn out as possible however thoroughbred horses may often need to be provided with sufficient shelter, protection and food in order to do well. Thoroughbreds breeding for the racing industry may foal earlier in the year. Many youngstock will not do well to prolonged periods of wet and cold. The compromise may be turn out through the day and stabled in the evening.

Some studs may keep breeding stock in barns which allows for more companionship and reflects a more natural management process. These examples are extremes but in general terms the judgement is around dealing with what is available; matching care to breed and needs of individuals and using turn out to the best possible advantage.

Assessment Criteria 6.5: Explain the physical needs of young horses

The learner should be able **explain** through discussion the young horse's need for the following:

- Group turn out; value of company for young horses, types of horses suitable for group turn out with young horses
- Stabling; evaluate whether there is need to stable young horses compared to 24/7 turnout. Consider factors such as breed, time of year and turn out availability
- Weaning; methods of weaning, age of foal
- Castration; when required, age of horse
- Feeding; requirements (consider factors such as breed, age and environment)
- Health care including joint development

ℹ️ TOP TIP

For the purpose of this question, a young horse is defined between the years of 0-3.

Example depth and level of knowledge

Weaning:

This is most commonly done at approximately 6 months of age. There are several ways to wean. If you have a field with lots of mares and foals take one mare out at a time. Be mindful that youngsters should not be left on their own. When dealing with small numbers it might be best to separate all the mares and youngsters at the same time. Before weaning is contemplated ensure that the youngster is eating independently. Any turn out space used for youngsters in this environment should be extra safe. Ideally the mares should be out of earshot once separated. It is always wise to make sure the weanling is well handled before weaning as handling will quickly be necessary following weaning.

Once the mares and foals have been separated establish a new routine quickly and one that can be maintained.

If you have only one mare and foal then try to remove them so they cannot hear each other. Try to find someone else in a similar situation so that both foals have company, or provide an alternative companion for your foal. Ideally, the companion should be of similar age and, if possible, sex.

Assessment Criteria 6.6: Explain methods of handling young horses

Learners should be able **explain** how young horses should be handled.

Methods of handling to include:

- Daily routine attention; general handling, picking up/out feet, grooming, tying up
- Work in hand; leading, trotting up
- Introduction to loading and transportation

Example depth and level of knowledge

Tying up:

The horse should be comfortable in a headcollar and being led.

Start putting a long line through a piece of string and keep hold of the long line making sure the horse realises it can't pull back. Give the horse something to eat while he gets used to staying in one position, do this for short periods and make sure there is nothing nearby to panic him. Lengthen the time each session. Stay with the horse when he is properly tied up.

TRAINING TIPS

✓ Work experience on a stud yard or yard where mares and foals are cared for will be beneficial for this learning outcome

LO7 Understand the care of older horses

> 🛡 **SKILLS RECORD SIGN OFF REQUIREMENT**
> Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 7.1: Explain how to recognise the signs of ageing

The learner should be able to **explain** the signs of ageing in relation to:

- Muscle tone
- Dental changes
- Eating habits
- Stiffness
- Coat colour

Example depth and level of knowledge

Muscle tone:

Muscle-wasting, also known as sarcopenia, is common in aged horses as reductions to the level and type of work affect muscle mass. Sarcopenia is most frequently noticed in large muscle groups, such as those along the topline and over the hindquarters. Generalised muscle loss gradually results in the area becoming weaker and the horse often develops a sway back. Sarcopenia is more common in older horses not being exercised, who have poor nutrition or PPID (Cushings). In these horses, the spine and hip bones may be more prominent.

In an older healthy, sound horse, regular gentle low-speed exercise can help to stabilise any further muscle loss.
Because of the changing musculature, regular saddle fitting checks will be imperative to prevent serious discomfort and potential pain to the horse if ridden.

Assessment Criteria 7.2: Explain ongoing care of the older horse

The learner should be able to **explain** the ongoing care required for the older horse to include:

- Feeding
- Management
- Turn out
- Work

Example depth and level of knowledge

Feeding:

It is always important to feed according to the individual needs of the horse. If a horse is overweight this results in arthritic joints having to carry more weight and becoming aggravated. However, weight loss in an older horse is often a sign of compromised health or a social problem whereby the horse is unable to access, digest or absorb the nutrients provided. Horses that experience pain or illness are likely to lose their appetite and in such cases veterinary attention should be sought. As with any horse, routine weighing and fat scoring are important to monitor any changes.

In some older horses the effectiveness of the molar teeth deteriorate (and with the added possibility of lost teeth), a geriatric horse may begin to struggle grinding down certain foods such as grains, mixes or rough forages. As a result the horse is at an increased risk of choke, colic and weight loss. The horse's diet will need to be carefully managed with softer, soaked, sloppy feeds that are easier for the horse to consume. Hay replacers are widely available and are ideal for an older horse with poor dentition. Short-chopped stalky forage should be avoided as it is difficult to grind effectively and may become trapped between the teeth as they get narrower, causing gum disease. Pelleted feeds are preferable to replace the fibre horses are not able to chew themselves. Soaking them can mean the teeth don't need to work very hard for the horse to get the nutrients he needs. Poor-quality incisor teeth can inhibit the horse's ability to graze productively, especially on short grass.

SECTION 2
UNIT 2
STAGE 4 SENIOR MANAGEMENT

To sign off the **Ready for Assessment** and **Trainer Endorsement** forms within the learner's Skills Record for this unit you must have achieved either the Performance Coach BHSI, Stable Managers qualification, Performance Section 2: Business Management, or Equestrian Tourism Centre Manager.
You must also hold a coaching qualification or Ride Leader Level 2.

GENERAL GUIDANCE

The information, guidance and example answers given in this guide relate to law, legislation and best practice in England and Wales. If the learner is sitting the assessment in countries outside of these, they should be able to fulfill the assessment criteria in relation to that country's laws and legislation.

CASE STUDY INFORMATION

At the Stage 4 Senior Management assessment, learners will be asked questions in relation to a case study to fulfil the assessment criteria for:

- Learning Outcome 6 - Understand financial requirements for an equestrian business
- Learning Outcome 8 - Understand different marketing opportunities.

The case study will be given to the learner on the assessment day. An example of the type of case study that will be provided is given below. Please note this is an example and this case study will not be used on the assessment day.

Moorland Riding Centre

Moorland Riding Centre is a trekking centre based next to a National Park. The majority of its business is seasonal. The centre provides hacking and trekking including longer day rides. Business is busiest from March to October. All treks and hacks are charged at the same hourly rate and prices have not been reviewed for some time. The centre currently does not provide any lessons although one of the permanent staff members holds a coaching qualification.

The centre has a website and advertises online with its main focus on attracting business over the summer. The centre would like to expand their business to offer lessons and hacks for local clients and have been approached by a local school to provide lessons offered as part of an afterschool activity scheme. The business is situated next to a property that has a number of holiday cottages. They have been approached by the owners of the neighbouring property who wish to form a partnership in order to provide riding holidays.

The business has two full time staff members and takes on a further two full time staff members and two part time staff members from March to October.

Learners will be given an additional case study and asked questions to fulfil:

- Learning Outcome 10 – Understand how to manage grassland.

An example of the type of case study that will be provided is given below. Please note this is an example and this case study will not be used on the assessment day.

New livery yard

You have purchased a property with land, you intend to set up a livery business. You have 10 acres, some of the land has previously been grazed by sheep. It is now December, you would like to start to advertise for livery clients and have livery services available by March.

LO1. Understand the importance of customer care

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 1.1: Compare different booking methods for equestrian businesses

The learner should be able to **compare** different types of booking methods and consider how they will work successfully in different environments.

Booking methods:
- Online systems including applications
- Paper based

Example depth and level of knowledge

Most centres find that telephone bookings are the preferred method of arranging lessons. Some encourage email requests followed by confirmation from the centre. Some centres share a 'grading' system on their website that helps potential clients

to self-assess their level and ability prior to their first lesson, and most yards will insist on an assessment lesson in the first instance (advised by most insurance underwriters for riding school public liability).

Most centres will require at least 24 hours' notice for cancellations or will impose a cancellation fee that varies from 50% to the full amount of the cost of the lesson. It is often possible to make block bookings at a reduced rate, although these may carry different cancellation rules.

Riders will normally be allocated with an appropriate horse, although at many yards clients may request a particular horse in advance.

Larger centres may have an online booking form for lessons, although this is quite difficult to manage as there needs to be a facility to be inbuilt to the booking form to prevent too many people of a similar height and weight booking onto the same lesson, or overbooking the horses and facilities.

Rider record forms should be completed and kept updated, as these may need to be used in the event of defending a centre against a spurious claim for negligence/injury.

Assessment Criteria 1.2: Justify the allocation of resources in a range of situations

The learner needs to **justify** the allocation of resources at certain times/seasons and give reasons for the points they make. Resources and situations should include:

- Riding lessons - horse to client, work loads
- Arenas – peak times and consider alternative uses for off peak (dog training/ car boot sales etc)
- Staff workloads - especially late nights or weekend working on fair rotas
- Allocation of horses/coaches

- Balancing liveries' use and riding school clients

Example depth and level of knowledge

Riding lessons horse to client:

Rider height and weight will be an integral factor to consider when allocating horses to riders. BHS policy regarding rider weight: No horse should be asked to carry more weight than it is comfortably able.
Failure to adhere to this is a breach of welfare and may cause long term physiological damage to the animal.
Most centres will have a suitable horse for almost everyone that is within a healthy weight range for their height. However the particular horse must be chosen carefully to reflect the rider's ability and riders must accept that there are some horses that are not sufficiently robust to carry them safely. It is important to remember the horse wears tack when ridden so this additional weight also has to be considered.

Whilst considering how much weight a horse can carry, the ideal bodyweight of the horse needs to be considered in conjunction with the actual bodyweight of the horse. A horse that is significantly overweight will not be sufficiently fit to carry additional weight. A horse that is significantly underweight should not be ridden.

Young horses are slower to develop sufficient balance and musculature and cold-blooded breeds (such as the Irish Draught) will tend to mature more slowly than warm and hot-blooded breeds such as the Thoroughbred. Elderly horses may also struggle to carry as much weight as younger horses of a similar size due to the effects of age and wear and tear on the body. The age at which a horse should be considered as elderly will vary with the fitness of the horse in question.
Certain breeds of horse have been bred specifically to carry weight. The Highland

Pony, as an example, was in part developed in order to transport heavy deer carcasses at a slow and steady pace. It would be therefore realistic to expect horses of this type to carry a bit more weight assuming that there are no confounding factors and the horse is working at a slow pace.

The conformation of a horse's back is particularly important in determining the maximum weight it can carry. Irregularities in the shape of the spine such as sway backs and pronounced withers (particularly common in older horses) mechanically weaken the spine and limit weight carrying capacity.

A beginner or novice rider is unlikely to have developed sufficient balance and skill to prevent them from moving around in the saddle. This will have a negative impact on the horse's spine.

Assessment Criteria 1.3: Evaluate a range of factors that contribute to successful customer care

The learner should be able to **explain** the following factors that contribute to successful customer care:

- 'Shop front' process - outward facing customer care
- Helpful language
- Time to help
- Making the client feel important
- How to handle challenging and emergency situations
- Maintaining the need for confidentiality and client contact

Example depth and level of knowledge

Outward facing customer care:

Successful customer care will ultimately result in; acquiring new clients, providing satisfaction, and building loyalty.

Priorities are:

1. *The overall quality of the goods/service*
2. *The friendliness of the staff dealing with them*
3. *The efficiency with which problems/ issues are dealt with*
4. *The speed of service/delivery of the goods/service in comparison to competitors*
5. *The helpfulness of staff in general*
6. *The effectiveness with which enquiries were handled, in particular the initial contact*
7. *The extent to which the customer felt they were valued*
8. *The competence of staff in completing their tasks*
9. *The ease with which the transaction was conducted*
10. *The extent to which the customer was kept informed of developments*

Assessment Criteria: 1.4: Compare the benefits of different membership schemes for clients

The learner should be able to **compare** the different schemes available to clients and be able to offer reasons as to why each one may suit different individuals. Membership schemes may include:

- BHS membership options
- Discipline – Member Bodies
- Pony Club
- Other

Example depth and level of knowledge

BHS membership:

BHS membership has two main strands; Gold and Silver. Gold membership is suited to those that own/loan or ride horses (ride horses other than those at a riding school), as it provides the member with Public Liability and Personal Accident insurance. If the client does not own or loan their own horse, then BHS Silver membership would be of benefit to them. Both memberships will support the charity and help the Society achieve its charitable aims across safety, access, welfare and education. Anyone that cares about horses will have an interest in the work the BHS does. Both membership options will also give the member the British Horse magazine. If the client wants to work in the equine industry then Gold membership should be recommended as this gives the member access to sit the BHS career pathways qualifications.

WANT TO KNOW MORE?

Current BHS membership benefits can be viewed on our website: **www.bhs.org.uk/membership**

TRAINING TIPS

✓ Work experience taking bookings, dealing with customer enquiries and being 'front of house' at a centre should be included in training

✓ Experience planning horses' workloads and facility/resource allocation should be included within the training

✓ Experience at different types of yard (trekking vs riding school, for example) or yards with different facilities would also be of benefit

LO2. Be able to use interpersonal skills

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Trainer or Employer Endorsement

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ This Learning outcome is also assessed by Trainer/Employer endorsement as the range of contexts cannot be assessed during the assessment day, so the trainer or employer must observe the learner in a range of these situations and sign off the skills record to confirm competency.

✓ **Ensure the 'Ready for Assessment' and Trainer/Employer endorsement forms in the learner's Skills Record are completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

This learning outcome will be assessed via an informal debate/discussion within a small group. The assessor will introduce a topic for the group to discuss. The learner will have an opportunity to give an overview of their points (this could be for or against the topic or idea given) and listen to other ideas presented within the group.

The aim of the debate/discussion is not to assess the learner's ideas or arguments (there will not be a right or wrong answer), but the assessors will be looking for considerate and respectful communication and listening skills as per the assessment criteria below. The topics for discussion will be listed on the website on the Stage 4 Senior Management page.

Assessment Criteria 2.1: Evaluate own interpersonal skills

The learner should be able to **evaluate** their interpersonal skills, to include:

- Setting realistic objectives, priorities and standards
- Reflect on own learning and progress
- Use of both verbal and non-verbal forms of communication
- Listening as an aid to meaningful communication, a two-way process

Assessment Criteria 2.2: Demonstrate effective verbal communication in a range of situations

Verbal communication to include tone and volume of voice.
Situations may include:

- Communication between different individuals and groups e.g. co-workers, managers, junior staff, employees, customers, clients, visiting coaches/ trainers, speakers
- Different contexts including training sessions, presentations, group meetings, performance appraisals, one-on-one discussions, interviews, disciplinary sessions

> **TOP TIP**
> During discussions on the assessment day, the learner should demonstrate effective communication skills to assessors and fellow learners during group discussions.

Assessment Criteria 2.3: Demonstrate effective non-verbal communication in a range of situations

Non-verbal communication to include:

- Gestures displayed through body language and physical distance between the communicators
- Body movements e.g. hand gestures, nodding or shaking the head
- Posture e.g. how you stand or sit, whether your arms are crossed
- Eye contact
- Closeness or personal space
- Facial expressions (smiling, frowning, blinking)

Situations may include:

- Communication between different individuals and groups
e.g. co-workers, managers, junior staff, employees, customers, clients, visiting coaches/trainers, speakers.
- Different contexts including training sessions, presentations, group meetings, performance appraisals, one-on-one discussions, interviews, disciplinary sessions

Assessment Criteria 2.4: Demonstrate effective listening skills

The learner should be able to **demonstrate** effective listening skills when communicating with others.
Listening skills may include:

- Informational Listening (listening to learn)
- Critical Listening (listening to evaluate and analyse)
- Empathetic Listening (listening to understand feeling and emotion), with consideration and awareness of mental health

Assessment Criteria 2.5: Demonstrate effective negotiation skills

Learner should be able to **demonstrate** effective negotiation skills when communicating with others during group discussions.
Negotiation skills

- Listening actively to the other party - involving the ability to read body language as well as verbal communication
- Respond appropriately
- Ability to influence others
- Ability to compromise

Some of the key skills for successful negotiation are:

Preparation: Have all the information required before starting and to be fully prepared for any eventuality.

Patience: Focus on the positive points of view before going on to settle any other issues.

Active listening: Listen to the other party to find areas for compromise during the meeting.

Emotional control: Sometimes sensitive issues can be frustrating, and allowing emotions to take control can often lead to negative results.

Verbal communication: Skilled negotiators must be able to communicate clearly and efficiently to the other party during the negotiation. If you do not state your case clearly, it can lead to misunderstanding and the possibility of an unfavourable result.

Problem-solving: Instead of concentrating on the end goal for the negotiation, it may be better to focus on problem-solving so you don't have a breakdown in communication.

Assessment Criteria 2.6: Demonstrate effective decision making skills

Learners should be able to **demonstrate** effective decision making skills when communicating with others during group discussions.

May include:

- Goals - working to achieve set objectives
- Problem solving
- Learning to make correct choices from seeing, listening and doing

The following matrix is a guide as to how the discussion will be assessed.

SKILL/S WITHIN THE ASSESSMENT CRITERIA	PROFICIENT	UNSATISFACTORY
2.2 Verbal communication	Communicated clearly; good voice and delivery rate.	Failed to communicate clearly; no eye contact; monotone delivery.
2.3 Non-verbal communication	Positive eye contact and good demeanour showed i.e. good posture, appropriate gestures and warm expressions.	Poor eye contact. Body language inappropriate, including bad posture, inappropriate gestures and expressions.
2.4 Listening	Remained focused on person speaking. Allowed others to complete what they were saying without interruption (unless where justified). Responses were appropriate and showed comprehension of other arguments/points.	Easily distracted, lacked focus. Showed little awareness for others. Little or no response to others, with little comprehension of arguments/points. Interrupted others unnecessarily or inappropriately.
2.5 Negotiation	Arguments were logical and convincing. Addressed most of opponent's arguments. Showed some influence over others and ability to compromise.	Few arguments were logical and convincing. Did not address opponent's arguments. Did not influence others and showed little evidence of compromise.
2.6 Decision making	Developed conclusion based on points made throughout discussion. Showed some adjustment of view based on input from others.	No viable conclusion made.
General overview	Proactive throughout, showing good balance between listening and initiating. Used a range of discussion skills to keep discussion going. Tried to involve everyone in the group. Understood the purpose of discussion and kept the discussion focused and on topic.	Lacked participation, resulting in little evidence with which to assess skills. Limited discussion skills, contributions did not focus on the topic and tended to support other views without adding further to points made.

TRAINING TIPS

✓ Similar to learning outcome 1, work experience taking bookings, dealing with customer enquiries and being 'front of house' at a centre should be included in training

✓ Building confidence with the skills listed in the learning outcomes will come from practical experience working with others, dealing with customers and working in or towards a senior position on a yard

✓ Organise a friendly discussion for the learner; this could be with yourself or others. Use the discussion topics listed on our website or think of your own.

LO3. Be able to manage staff

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 3.1: Evaluate different ways of employing staff

The learner should be able to **explain** logical reasons for why staff may be employed in different contexts. Contracts of employment should be discussed and the content, including social media clauses. Ways of employing staff include:

- Sub-contractors
- Part time/ full time/ volunteers
- Visiting lecturers
- Zero hours
- Apprentices
- Self-employed

Example level and depth of knowledge

Self-employed:

Self-employed people effectively run their own business – they may, for example, be an independent riding coach or someone who specialises in backing and bringing on young horses on their own private land. In some contexts, they may 'double' as an independent contractor to a business – for example a self-employed electrician who comes to fix some wiring problem at a yard.

Self-employed people are not paid through PAYE and don't have the same employment rights as employees for example no sick pay or holiday. They are responsible for paying their own National Insurance and Tax. A self-employed person usually agrees a price for the work and an invoice is submitted for payment at the end of the work.

3.2 Explain the purpose and process of staff development

The learner is expected to **explain** the purpose and process of staff development, to include:

- Use of appraisals
- Criteria for assessment
- Performance review
- Action plans
- Continual Professional Development (CPD)
- Dealing with concerns, for example grievance, disciplinary

Example level and depth of knowledge

Appraisals:

An appraisal, or performance review, is an opportunity for team members to discuss their performance, development needs and aspirations with a manager or company representative. Both team member and appraiser should provide examples of good performance and development requirements so that performance and job satisfaction can be enhanced.

Performance should be monitored and discussed continually throughout the year via one to ones, but a more formal method of recording development and performance should be carried out via the appraisal process. This process may vary between organisations, but, for example, January is when objectives and targets can be set for the year ahead. A mid-year review should be conducted in June to review the progress of the targets and put measures in place if there are concerns for the team member not meeting expectations. December is when the year is reviewed and achievement is recorded against the objectives set. Objectives are discussed for the following year, and then the cycle begins again in January. An appraisal should be a development opportunity for the team member and should be a chance for two-way conversations to occur. The appraiser should not use the appraisal as a way to bring up concerns/performance that has not already been discussed in continual one to ones; nothing should come as a shock to the team member during an appraisal. An appraisal is also an opportunity for the team member to discuss development opportunities and how they would like to progress within the organisation.

Assessment Criteria 3.3: Produce training plans to develop staff

The learner should have experience in producing training plans to develop staff, which identifies:
- Target setting
- Identifying training needs against job role
- Short (one month), medium (six months) and long term (one year) aims

The learner should have had experience with setting training plans for staff and should be able to explain how they identified the goals set in conjunction with the member of staff, and how they measure progress.

TRAINING TIPS

✓ Experience shadowing a senior manager who has responsibility for developing staff will be of benefit for this learning outcome

LO4. Understand requirements for self-employment

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 4.1: Explain the specific requirements of a self-employed coach

The learner should be able to **explain** the requirements of a self-employed coach, to include:

- Insurance
- Vehicles
- Riding school license if using your own horses
- Planning permission if on your own premises
- Health and safety

Example level and depth of knowledge

Insurance:

Public Liability insurance protects the coach if a member of the public comes to harm or has their property damaged due to something careless the coach has done. Public Liability insurance is one of the benefits with APC membership, although this can also be sourced independently. The insurance should cover you whilst undertaking duties as a coach/groom etc. Insurance can be paid in monthly instalments or an annual sum. Public liability insurance for self-employed coaches is not required by law, but is strongly recommended to protect the coach if any legal action were to be taken.

Self-employed coaches should also consider taking out personal accident insurance. This is especially important if they ride as part of their work. If a coach were to become injured and unable to work this would provide some income until they recover.

Assessment Criteria 4.2: Compare the benefits of different membership schemes for self-employed coaches

The learner should be able to **compare** the different membership schemes that will support self-employed coaches. Schemes

may include:

- BHS Accredited Professional Coach
- Discipline – British Equestrian Member Bodies
- British Grooms Association
- Other

Example level and depth of knowledge

APC membership:

Accredited Professional Coach membership is offered by the BHS for coaches qualified to Stage 3 Coach, or equivalent.

The requirements for joining and remaining a current APC are:

- *BHS Stage 3 Coach qualified, or equivalent*
- *Public Liability insurance*
- *Current first aid at work or equine specific first aid qualification*
- *Current safeguarding and protecting children workshop attendance*
- *DBS check*
- *Current attendance at an approved CPD event*
- *Agreement to adhere to the coaches Code of Conduct*

The benefits of joining as an APC are:

- *BHS First Aid and Safeguarding courses included with duration of membership*
- *BHS Gold membership*
- *Option to take out Public Liability including Grooms insurance and care, custody and control and Personal Accident insurance*
- *Access to over 200 lesson plans and other resources*
- *Access to an exclusive professional online community*
- *Access to discounted CPD events in partnership with BEF member bodies*
- *Free APC jacket (first year only)*
- *Access to deliver the Challenge Awards, become an Accredited Ride Safe Trainer,*

Accredited Riding Out Trainer and Accredited Stage 4 Trainer
- *Discounted BHS assessment fees*

APC membership can be paid via annual or monthly direct debit, or annual credit or debit card payment. Some of the benefits above relate to membership in the UK only.

WANT TO KNOW MORE?

Current APC membership benefits can be found on our website: **www.bhs.org.uk/professionals/ accredited-professionals**

Assessment Criteria 4.3: Explain the benefits of Continued Professional Development for a self-employed coach

The learner should be able to **explain** the benefits of Continued Professional Development (CPD), to include:
- Assessing own performance
- Target setting
- Identifying need against job role
- Type of CPD available

Example level and depth of knowledge

CPD:

CPD helps keep knowledge and skills up-to-date. It ensures that the professional standard of qualifications is maintained. It contributes to a professional sense of direction, builds confidence and credibility, allows a coach to showcase their achievements and equips them with tools to cope positively with change. CPD requirements should be identified via feedback from clients, mentors and self-evaluation. Each year, the coach should review their coaching skills and try to source CPD that will help to address any areas for development. CPD should be sourced to develop the coach, an event should not be attended simply because it is the closest/ cheapest or most convenient. CPD should aim to; deliver information, teach/learn a new skill or instil a change in behaviour. The most successful type of CPD is when the coach can get involved as this helps to learn the underpinning knowledge that may come with developing a new skill.

CPD themes may include:
- *Topics that support the rider (for example, mental or physical development, biomechanics or technical or tactical support)*
- *Topics that support the horse (for example, fitness and training, care and management, behaviour and handling, tack and equipment, anatomy and physiology)*
- *Topics that develop interpersonal skills (for example, leadership, building rapport, communication and engagement, coaching skills)*
- *Self-awareness, planning and emotional intelligence)*

The coach should vary the CPD they attend to try to cover different themes on a regular basis, and not limit themselves to their 'comfort zone'.

The regularity of CPD will depend on whether the coach is accredited to any professional body, for example, BHS APC membership requires annual CPD of at least 6 hours in total.

CPD can also be gained from shadowing a more experienced coach, working with dressage judges or show jumping course builders, cross country course walks or professional discussions. CPD can also be sourced from non-equestrian events, for example UK Coaching host many workshops that have coaches attending from many different disciplines allowing good practice to be shared from multiple sports. CPD is a way for freelance coaches to network with other coaches, which is important as a freelance coach may work in isolation.

TRAINING TIPS

✓ Experience shadowing a freelance coach (if the learner doesn't already have experience of this)

✓ Research a range of CPD available, not just equine specific but general sports coaching CPD.

✓ UK Coaching is a helpful resource to find non equine specific sports coaching CPD www.ukcoaching.org/

LO5. Understand the roles and responsibilities of a yard manager

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 5.1: Explain the requirements of relevant legislation and your responsibilities

The learner should be able to **explain** the requirements of relevant legislation, to include:

- Animal Welfare licence
- Planning permission regulations for business use
- Health and Safety legislation
- Stable yard risk assessment
- Fire risk assessment requirements
- General Data Protection Regulation (GDPR)
- Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
- Control of Substances Hazardous to Health (COSHH)
- Safeguarding
- Equality, diversity and inclusion
- Health and Safety at Work Act

Responsibilities to include:

- Horse welfare
- Social License to operate
- Promote equestrianism in a positive way
- Management and training of employees

Example level and depth of knowledge

Animal Welfare Licence:

All businesses that hire out horses for riding or for riding lessons are required by law to possess the Animal Welfare (Licensing of Activities Involving Animals) (England) Regulations 2018 current licence.
This includes riding schools and those that hire out horses for trekking, loan horses, hire hunters, offer polo/polocrosse instruction and run pony parties (but only where the ponies are ridden) and offer pony and donkey rides. In order to receive a licence a business will need to meet all of the minimum standards set out in the Defra document.

The person who holds the licence must possess an appropriate formal qualification,

or have sufficient demonstrable experience in the management of horses, as well as holding a valid certificate of public liability insurance, which must also be displayed.

The running of the business must never be left in the charge of anyone who is under 18 years old and no horses should be hired out except under the supervision of a person aged 16 years or more, unless the licence holder is satisfied that the person hiring the horse is competent to ride without supervision. All records must be available for inspection by an inspector and kept for at least 3 years, beginning with the date on which the record was created.

5.2 Explain the purpose of different types of insurance

The learner is required to **explain** the purpose of types of insurance, such as:

- Public liability
- Employers liability
- Horse insurance
- Vehicles and buildings

Example level and depth of knowledge

Employers Liability insurance:

It is a legal requirement of the Employers' Liability (Compulsory Insurance) Act 1969 for any employer to have this insurance, whether their staff and helpers are paid or not. However, there is not a legal requirement for employers' liability insurance for people who work as self-employed contractors on a yard unless they are using the yard's equipment. If they do, then the employer is still responsible for their health whilst in the workplace.

An employer has a legal responsibility to protect the health and safety of their employees. For example, a risk assessment that is suitable and sufficient must be in place, and all reasonably practicable measures to protect employees must be taken.

The minimum legal amount of employers' liability cover is £5 million but individual risks and liabilities should be considered and this

sum may be increased. The Health and Safety Executive (HSE) enforces the law on employers' liability insurance and HSE inspectors can check that there is an employers' liability insurance in place with an approved insurer for at least £5 million. There is a fine of up to £2,500 for any day without suitable cover in place.*

The type and amount of cover required for a premises will depend on its individual characteristics, but it always make sense to check the details of any cover and consult the company on any finer points.

TRAINING TIPS

✓ Legislation and legal requirements for a business can be found:
- Defra: https://www.gov.uk/ government/organisations/ department-for-environment-food-rural-affairs
- Gov.UK: https://www.gov.uk/

LO6. Understand financial requirements for an equestrian business

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment

✓ This learning outcome is assessed on the assessment day
✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment Criteria 6.1: Evaluate pricing methods

The learner should be able to identify several pricing options and **explain** the importance of each, to include:

- Different pricing structures
- Peak/off peak
- Pricing of services such as liveries, facility hire, competition
- Special rates
- Importance of overheads

Example level and depth of knowledge

Pricing structures:

Many yards will start their pricing strategy at what they consider to be the 'going rate' for their various services. Different pricing structures will be driven by local demand and the level of service provided, but in most commercial riding schools there will be a differential for the length of the lesson, type of lesson, the level of the coach, whether it is a group/private or semi-private lesson, and the time of day or day of the week that it takes place (peak or off peak).
Some yards have discounts for regular customers who 'block book' in advance, or pay by standing order, and others offer concessionary rates for particular groups such as Riding for the Disabled.

Assessment Criteria 6.2: Evaluate a range of methods of payment

The learner should be able to **explain** the various methods of payment to include:

- Debit and credit cards
- Cash
- Cheque
- Automatic bank transfers
- Online payment
- Recording payment
- Advance payments
- Cancellation policies

Example level and depth of knowledge

Debit and credit cards:

Credit and debit cards are widely used and a popular method of payment. This payment method requires the business to have a device to be able to take the payment, this could be a web portal or a hand-held terminal. Either of these options will require a subscription to a provider to process the transactions. This will be a cost to the business which is usually a percentage of the transaction amount. They may also require a fixed annual hire fee for the use of the device. These costs should be factored before deciding if credit or debit card payments should be taken, although this should be weighed up against customer ease and preference too. Credit or debit card payments can either be taken via phone, online or face to face. If taking payments via phone or face to face it is good practice to enter these details to the device at the time of taking payment to avoid these details being written down. Another advantage of taking the payment at the time of the booking is that if the payment fails you can resolve it with the customer there and then. If taking payments online it is essential your website is secure and has the necessary processes in place to prevent information being accessed by hackers. Again, there will be a cost for this service to the software provider.

Assessment Criteria 6.3: Explain a range of accounting requirements

The learner should be able to **explain** the accounting requirements for an equestrian business, to include:

- Information an accountant needs
- Invoices
- Receipts
- Profit and loss
- Business viability
- Business plans
- Financial year
- Accountant interaction

- Online tax payments
- Personal /business allowance

Example level and depth of knowledge

Receipts:

Receipts will be required for all goods or services that were bought for the business. This could include goods such as food, bedding and hay and services such as building repair work, farrier and vet. The receipt should state the company or individual name and address and the goods or service that was provided, the rate of VAT, the date, total paid and method of payment. Receipts also need to be kept for any expenses that were accrued whilst on business use, for example fuel. These receipts will need to be stored safely and presented for the accountant/auditor at the end of the financial year. They will then be stored for six years, or as advised by the auditor/accountant.

Assessment Criteria 6.4: Explain how to manage business costs

The learner will know the difference between fixed and variable costs of an equestrian business and **explain** how to manage them:
Fixed costs (largely unmanageable)
- Rent
- Business Rates
- Licences
- Insurance
- Depreciation

Variable costs (manageable)
- Utilities (gas, water, electric, sewage etc.)
- Stock
- Feed
- Professionals
- Wages and salaries
- Tack
- Maintenance
- Equipment
- Expenses

Example level and depth of knowledge

Fixed costs/rent:

Fixed costs remain the same to the business each month, no matter the output/goods/ services the business produces. Variable costs vary with the amount of work/output the business produces. For example, the rent of the land/mortgage of buildings will largely stay the same each month no matter how busy or profitable the business has been or will be. It also does not fluctuate depending on the time of year. Fixed costs are largely unmanageable as usually there is little lee-way to these, the management would be required to pay these bills each month. Each year you may get a chance to review the rent or mortgage fees for example, but once set, they will remain constant each month. Discounts may be available if paid in one lump sum instead of monthly payments, or direct debit discount over credit/debit card payments.

Assessment Criteria 6.5: Explain pay requirements for a business

The learner will be able to **explain** salary legislation and apply it to a business.
Pay requirements to include:
- Minimum/living wage
- Apprenticeship wage
- Maternity
- Sick pay
- Pension
- Redundancy

Example level and depth of knowledge

Minimum/living wage:

The minimum wage a worker gets is dependent on their age and if they're an apprentice. The National Minimum Wage is the minimum pay per hour almost all workers are entitled to. National Minimum Wage applies to any worker (non-apprentice) that is at least school leaving age. The National

Living Wage is higher than the National Minimum Wage and applies to anyone over 25. It does not matter how small an employer is, they still have to pay the correct minimum wage. Contracts for payments below the minimum wage are not legally binding. The National Living Wage and National Minimum Wage change every April and the current rates can be viewed on the gov. uk website. Workers are also entitled to the minimum wage if they're part-time, casual labourers, agency workers, trainees or on probation, foreign workers or disabled workers. Workers not entitled to the National Minimum Wage or National Living Wage include self-employed people running their own business, company directors, volunteers or voluntary workers, workers younger than school leaving age, higher and further education students on a work placement up to one year, workers on government pre-apprenticeship schemes. (Source, www.gov.uk).

TRAINING TIPS

✓ Experience shadowing a senior manager who has responsibility for financial records will be of benefit for this learning outcome

✓ Legislation and legal requirements for a business can be found:

• Gov.UK: https://www.gov.uk/

LO7. Understand record keeping requirements for an equestrian business

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 7.1 Explain records kept

Learners will be able to **explain** different records kept by an equestrian business and how they are used:

• Horse health records
• Client records
• Riding records/progress /review

Example level and depth of knowledge

Horse Health Records:

Horse health records would include information regarding; farrier, veterinary appointments, routine vaccinations, equine dental technician, saddle fitter, back/physio, and any other professional as required or referred by a vet.

The records should state; date of appointment, what occurred (for example, treatment), advice given and length of time before next appointment.

The health records will be used to monitor routine health visits and identify any patterns or reoccurrences of issues that could then perhaps be managed differently in the future. Staff should be trained on the maintenance of the records, so all information is consistently recorded and stored for ease of use.

Assessment Criteria 7.2: Explain how business information is stored

The learner should be able to identify information that is required to be stored and **explain** the requirements for this. Information may include:

- Health and Safety (risk assessments, accident reporting, first aiders)
- Employee records (contracts, bank details, emergency details, appraisals)
- Financial records
- Client records
- Conflict of interest paperwork

Storage requirements may include:

- Filing requirements
- Hard copy v electronic
- Confidentiality
- Data protection legislation

The learner should have an understanding of how long different types of information are required to be stored for, and how the information should be stored.

Example level and depth of knowledge

Data protection:

The General Data Protection Regulation (GDPR) was introduced to strengthen and standardise data protection policies. 'Data' refers to any personal information stored. GDPR applies to all organisations. The processing and storage of data should comply with GDPR requirements. Consent should be received from the data subject (the person) with regards to storing their data and they should be informed how the data will be stored and for how long. The business will also need a process for dealing with any GDPR breeches.

LO8. Understand different marketing opportunities

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment criteria 8.1: Evaluate different types of marketing

The learner should be able to **explain** different types of marketing and decide which is most relevant to a particular business. Types of marketing to include:

- Using market research
- Advertising (digital, press)
- Electronic communication
- Social media
- Open days

Example level and depth of knowledge

Market research:

Market research helps to develop a business and to reduce future risks

A business may want to identify the current and future needs of their clients, the price they will pay for lessons or services, or to investigate the potential success of a promotional campaign

Primary research involves finding out new, first-hand information directly from clients or potential clients. Methods of primary research include; questionnaires, focus groups and observation

Secondary research involves gathering existing information from other sources and could include reading reports, trade magazines and other business websites

Assessment Criteria 8.2: Justify different marketing campaigns

The learner will be able to **justify** which type of campaign will work for different business models, to include:

- Choices of marketing types
- How to record success

The learner will be given a scenario describing an equestrian business and how the business is performing. The learner should be able to plan a brief marketing campaign using at least two types of marketing and explain how they would be implemented. The learner should be able to provide reasons for the marketing types preferred and why other types of marketing may not be suitable for the business.

LO9. Understand how to manage a yard

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment criteria 9.1: Compare the benefits of different types of approval schemes for businesses

The learner will understand the different schemes available for equestrian businesses and **compare** the benefits of each. Types of approval schemes to include reference to quality assurance systems provided by scheme. To include:

- British Horse Society
- Association of British Riding Schools +
- Pony Club
- Riding for the Disabled Association
- Other

Example level and depth of knowledge

BHS:
- *The BHS supports centres by helping them to provide the highest standards and conform to the latest health and safety requirements*
- *BHS centres can advertise on the BHS website*
- *The BHS can provide advice and support on numerous topics and issues*
- *Approved Centres also have access to designated business support lines*
- *Discounts available with companies such as Blue Chip and Mirrors for Training*
- *Insurance discounts through South Essex Insurance Brokers*
- *Access to join staff to the Accredited Professional Centre scheme as coaches, ride leaders or grooms. These professionals will then have access to discounts on assessments and other events and training such as first aid*
- *BHS Approved Centres can deliver courses such as the Challenge Awards and the Riding Centre Assistant Award*
- *A BHS Approval plaque is provided to display at the centre*
- *Free BHS Gold membership for the proprietor*
- *Access to an online network of supporting documents including lesson plans and templates for business documents*
- *Newsletters to provide information and updates to inform the business.*

WANT TO KNOW MORE?
BHS Approval benefits are listed on our website:
www.bhs.org.uk/professionals/ become-bhs-approved

Assessment Criteria 9.2: Explain working relationships with a range of associated professionals

Learners will be able to **explain** the value of working relations with a range of professionals, including:
- Farrier
- Vet
- Feed/forage merchant
- Equine dental technician
- Physiotherapist
- Saddle fitter

Example level and depth of knowledge

Farrier:
A good working relationship with a qualified and registered farrier is essential, as the saying goes no foot, no horse.
As the horses will be pivotal to the success of a yard, it is vital that essential healthcare, such as foot health, is managed correctly. A good working relationship with a farrier can be established by horses being ready on time, payments being made promptly and such care like dry, clean and picked out feet ready for the farrier to begin. If the farrier is there for a long time refreshments such as tea and coffee will be received well. Ideally provide a sheltered and covered area and a level surface for the farrier to work on. The farrier will be vital in the rehab of lameness or conditions that affect foot health (such as laminitis) so keeping them up to date with relevant vets appointments will also encourage a good working relationship. Routine appointments should try to be booked in advance to help the farrier plan their schedule and maintain good relations, this way, they may be more compliant to fit in emergency appointments when needed.

Assessment Criteria 9.3: Explain how to maintain facilities

The learner will be able to consider the facilities on the yard that need regular maintenance and **explain** a plan for this. Facilities may include:

- Yards
- Stables
- Arenas
- Store and ancillary buildings
- Fencing
- Cross-country course

Example level and depth of knowledge

Arenas (non grass):

All surfaces will require daily levelling, and some very busy arenas may need to be harrowed twice a day. This is usually done with a tractor pulling a harrow and leveller. Most types of surface will have a machine designed specifically for their maintenance. Particular attention should be paid to the outside track, the lungeing area and any part where jumping takes place. The surface in some arenas may move, especially if they have been built on a slope, in which case you may end up with more surface at one end of the arena than the other. If this happens, professional assistance from the arena supplier may be needed.

Maintenance of all areas should be done on a regular basis and recorded in a maintenance book or file. This can contain information such as the amount and type of fertiliser used on the fields, when to apply certain weed-killer and in what quantity. Also, when vehicle MOTs and plating need to be renewed and when servicing is due. If a certain amount of time is allocated to maintenance on a daily or even weekly basis much money can be saved and the yard will be safer and smarter. Depending on the type and size of the yard, it might make economic sense to employ a maintenance person on a part-time basis.

Assessment Criteria 9.4: Evaluate a range of security procedures on the yard

The learner will be able to consider a range of safety methods and **explain** their use, to include:

- Alarms
- CCTV
- Sensor lights
- Security patrol
- Effective access security

Example level and depth of knowledge

Alarms:

Having someone living onsite is the best security measure; if accommodation is situated beside the yard entrance it is easier to keep an eye on comings and goings. Burglar alarms can be useful as they would be a deterrent if sounded, as long as the yard is within earshot of someone who will take notice, as many yard managers do not live on site. If not on site, consider alarms that trigger police or security being informed, they usually then would contact the proprietor. This would come with a service charge. The local police crime prevention officer can offer advice, ensuring that the most appropriate preventive measures are adopted. Alarms would generally not work as the only security measure, as fields, yard areas and other buildings may not be covered by the alarm depending on the layout of the yard..

TRAINING TIPS

- ✓ Practical, working experience of maintaining facilities would be beneficial
- ✓ Research into different types of arena surfaces and the maintenance required for each.

LO10. Understand how to manage grassland

Assessment criteria 10.1: Analyse annual grassland maintenance programmes

The learner will be able to **analyse** several relevant factors relating to grazing and other grassland and produce a recommended plan for ongoing maintenance, to include:

- Topping
- Harrowing
- Rolling
- Fertilizing
- Spraying
- Over sowing
- Weed control
- Fencing including electric
- Shelter
- Water
- Gateways
- Stocking rate
- Removal of droppings
- Soil analysis
- Drainage

The basic requirements for horse pasture management are; to provide turnout and/or grazing for horses all year round, to create and maintain grasses with a good bottom growth and the ability to produce a dense sward, to minimise infestations from worm larvae and to maintain the land as a good visual amenity.

The learner should be able to analyse the strengths and weaknesses of each of the maintenance points above, and to suggest a maintenance plan for an equestrian business. A scenario will be given to the learner for them to recommend a plan based on the requirements. An example of this is on page 33.

TRAINING TIPS

✓ Practical, working experience of maintaining grassland would be beneficial
✓ Plan an annual maintenance program for an equestrian facility. Use the example case study on page 33.

SECTION 3
UNIT 3
STAGE 4 SENIOR LUNGE

To sign off the **Ready for Assessment** and **Trainer Endorsement** forms within the learner's Skills Record for this unit you must have achieved either the Performance Coach BHSI, Senior Equitation or Performance Unit 5: Working the horse from the ground.
You must also hold a coaching qualification or Ride Leader Level 2.

GENERAL GUIDANCE

Good stable management practice of handling horses, tack and equipment with safety and care should be followed at all times. The assessor will want to see the learner follow safe and efficient practice they can apply when working with any horse, whether mare, gelding, stallion or youngster. The age and/or sex of the horse should be checked, before commencing work, if appropriate.

LO1 Understand how to lunge competition horses

> ### 🛡️ SKILLS RECORD SIGN OFF REQUIREMENT
> Trainer Endorsement

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 1.1: Evaluate the use of a range of training aids for lungeing

The learner should be asked to **evaluate** the use of training aids. Consider factors such as; reasons for use, advantages and disadvantages, and problems caused by incorrect use.

Any training aids in common use which may include:

- Side reins (variations of type and positions)
- Pessoa/Whittaker
- Chambon
- Harbridge
- Vienna reins
- Bungees
- Running reins
- De Gogue
- Waldhausef

Evaluate through discussion, including:
- Consideration of horse welfare
- Effectiveness for purpose

Example depth and level of knowledge

Pessoa:

A Pessoa is designed to be used progressively over a period of time. Before using a training aid, considerations to be made include; is it necessary, will it harm the horse and is the person using the aid experienced?

The Pessoa consists of ropes and pulleys that attach to the bit and run alongside the body and around the hindquarters. There are different positions that can be attached depending on the horse's stage of training. Work should always be started on the lowest setting, for a short period, for example, a few minutes on each rein. The work can be gradually increased to 20 minutes per session over a series of weeks. The basic idea of the Pessoa is to encourage the horse to work with a lowered head carriage and rounded outline and to work through from behind. They can also help to build up muscle along the back and hindquarters following injury.

When using any training aid the horse should be introduced slowly, to allow their muscles to develop. If the training aid is used incorrectly, the horse can be put under too much strain and physically damaged. It could also cause behavioural issues with the horse becoming uncooperative. The training aid should not be used as a quick fix and injuries, way of going and wear and tear should all be considered. Due to the rope system of the Pessoa, and how it comes around the horse's hindquarters, some horses will not like the feeling, particularly young horses, and may react to it. Care should be taken the first few times to allow the horse to accept the feeling of the ropes around the hindquarters.

Assessment Criteria 1.2: Explain the use of long reining

The learner should be able to **explain** when and why to use long reining as a suitable exercise for horses at various stages in their training.
Use to include;

- Different types of long reining
- Use for young horses
- Use for experienced horses
- Process of introducing long reining to a horse

Example depth and level of knowledge

Use for young horses:

Long reining can be a useful training tool for young horses. It will introduce contact on both reins, whilst stimulating energetic movement from the additional line around the quarters. It should help the horse to accept contact before moving onto ridden work. As the handler has two lines when long reining it is easier to keep a young horse on the line of direction of the circle and prevent him from falling in or out. Having two lines provides more control, work can also be done on suppleness and bend whilst long reining. Different environments can be introduced (for example bridleways and tracks) via long-reins, but this should always be carried out with two people (one close to the horse's head) in case the horse spooks.

LO2. Be able to lunge a competition horse to develop its way of going

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Ready for Assessment

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment criteria 2.1: Maintain health, safety and welfare of horse, self and others at all times

The learner should show regard for health, safety and welfare of self, others and horses throughout the lunge session, in relation to:

- Use of schooling area
- Awareness of space and other users
- Horse fitness and level of education
- Checking tack for safety
- Leading the horse
- Appropriate personal protective equipment for handler
- Lungeing the horse
- Lungeing with poles

The learner should check all lunge equipment for safety and fit. The horse can be warmed up without side reins (these can be put on during warm up if required e.g. to help control horse).

The horse should be moved through changes of rein safely and sent out on an appropriate sized circle. The learner should be positioned safely throughout, handling equipment safely at all times. The length of the session needs to be suitable for the horse. The equipment should be adjusted to improve the horse's performance. If poles are used, these must be set out to a safe distance for the horse.

Assessment Criteria 2.2: Assess and evaluate the horse's way of going

The learner will **evaluate** the horse's way of going throughout the session
Way of going to include:

- Informed observation of the horse working in walk, trot and canter
- Comparison of way of going on both reins
- With and without side reins

Assessment Criteria 2.3: Demonstrate techniques appropriate for the horse

The learner should **demonstrate** techniques to include:

- Handling of equipment
- Stance, body language, position, tone of voice, influence
- Appropriate circle size
- Side reins attached appropriately
- Working at relevant rhythm and tempo
- Work over poles (as appropriate)
- Developing balance

Assessment Criteria 2.4: Utilise a range of exercises to improve the horse's way of going

The learner should be experienced working horses on the lunge as a means of schooling and improvement and not just exercising.

The learner should be able to use the following exercises appropriately during their session:

- Transitions
- Collecting and lengthening stride
- Increasing and decreasing the size of the circle
- Use of poles (as appropriate) to develop the way of going

The exercises should show an improvement in the horse's way of going (discussed in 2.2).

The learner must show confidence and competence to undertake a variety of exercises necessary to improve the horse's way of going. Side reins must be used during the main part of work. The horse should be worked in all three paces on both reins, through changes of pace and stride, transitions should be used and the circle size adjusted as required. Poles should be used if appropriate for the horse and conditions and appropriate exercises chosen. If it is not appropriate to use poles (i.e. horse is too fresh) then the use of poles can be discussed.

The canter does not need to be maintained if not balanced, but an assessment of the canter needs to be made.

Walking when lungeing is acceptable when it is necessary to keep the circle size big.

Assessment Criteria 2.5: Develop an effective rapport with the horse

The learner should develop a rapport with the horse to gain trust and encourage the horse to work to its fullest potential:

- Manner with the horse
- Effectiveness of aids
- Control and influence over horse's way of going
- Empathy with the horse's needs

Assessment Criteria 2.6: Evaluate the session

Learners should be able to **evaluate** the session, to include:

- Reflection on the content of session
- Logical sequence and timing
- Debate of effectiveness of exercises chosen
- Identify strategies to improve personal performance
- Identify effective techniques used

The learner is expected to talk about the horse's paces, their outline and carriage, straightness, suppleness and willingness.

Assessment Criteria 2.7: Develop a plan for progression

From their assessment and evaluation of the session, the learner will develop a suitable plan for the horse's work on the lunge. The plan should include:

- Identify areas for improvement
- Consideration for progression of future sessions for the development of this horse, short term (one month), medium term (six moths).

TRAINING TIPS

- ✓ Experience lungeing different types of horses is crucial for success in this learning outcome
- ✓ The learner should have experience ageing horses and evaluating their way of going quickly within a lunge session and use this to plan the session
- ✓ The learner should be confident with their lunge technique to be able to control horses of varying ages and fitness levels
- ✓ Reflect on all lunge sessions with the learner so they become confident evaluating their own performance
- ✓ Video the learner so they can watch it back and reflect on their technique (ensure you have their permission to do this)
- ✓ Research to see if there are any lungeing, long reining or schooling from the ground clinics or CPD events.

SECTION 3. SENIOR LUNGE

SECTION 4
UNIT 4
STAGE 4 SENIOR RIDE FOR TRAINING EVENTING

UNIT 5
STAGE 4 SENIOR RIDE FOR TRAINING DRESSAGE

UNIT 6
STAGE 4 SENIOR RIDE FOR TRAINING SHOW JUMPING

To sign off the **Ready for Assessment** and **Trainer Endorsement** forms within the learner's Skills Record for this unit you must have achieved a BHS Performance level unit for the discipline being signed off. If you have achieved the Performance Coach BHSI, Senior Equitation or Performance Unit 6: Ride for Training, you can sign off all riding parts of the Skills Record. If you have achieved Performance Unit 7: Ride for Training Dressage or Performance Unit 8: Ride for Training Show Jumping you can sign off the dressage or show jumping related Trainer Endorsements or Ready for Assessments respectively. You must also hold a coaching qualification or Ride Leader Level 2.

LEARNING OUTCOME COMBINATIONS FOR RIDING UNITS

This section covers all the learning outcomes required for all three Stage 4 Senior Ride for Training units. Not all learning outcomes are required to be completed for each unit. The table below outlines the learning outcomes required to be completed for each unit.

LEARNING OUTCOME	UNIT		
	UNIT 4: STAGE 4 SENIOR RIDE FOR TRAINING EVENTING	UNIT 5: STAGE 4 SENIOR RIDE FOR TRAINING DRESSAGE	UNIT 6: STAGE 4 SENIOR RIDE FOR TRAINING SHOW JUMPING
LO1. Understand the training of young horses	✓	✓	✓
LO2. Be able to ride safely	✓	✓	✓
LO3. Understand how to progress the training of a dressage horse	✓	✓	
LO4. Understand how to progress the training of a show jumping horse	✓		✓
LO5. Be able to ride a trained horse in a double bridle to develop its way of going	✓	✓	
LO6. Be able to ride an inexperienced dressage horse with a view to developing its way of going	✓	✓	
LO7. Be able to ride an experienced horse over show jumps up to 1.10m (3ft 7ins) with a view to developing its way of going	✓		✓
LO8. Be able to ride a horse cross country over fences up to 1m (3ft 3ins) with a view to developing its way of going	✓		
LO9. Be able to ride horses used for training others, with a view to developing their way of going		✓	✓
LO10. Be able to ride an inexperienced horse over show jumps up to 1m (3ft 3ins) with a view to developing its way of going			✓

GENERAL GUIDANCE FOR THE RIDING ASSESSMENTS

Good practice of handling horses, tack and equipment with safety and care should be followed at all times. The assessor will want to see the learner follow safe and efficient practice when working with any horse, whether mare, gelding, stallion or youngster.
The age and/or sex of the horse should be checked, before commencing work, if appropriate.

The horse will be presented tacked up, but the learner should be able to adjust the tack as they would at home. They may ride in groups of up to four and are expected to work in open order, showing respect and consideration for the other riders in the arena.

When riding on the flat, the learner should be able to work the horse to make the most of the basic gaits and the way of going and identify any problems. They should be able to ride within the horse's level of capability to discover the level of training. Areas for improvement should be identified early in the riding and the plan of work and exercises carried out should aim to improve the horse's way of going. It is the ability to improve gaits and work that should be seen.

For show jumping the learner will be expected to work the horse in using two or three fences. From this, the learner should be able to discover the basic good and bad points of the horse and it's jumping ability. The learner should have a thorough knowledge of the distances used for schooling and competition. The learner should be able to quickly establish a rapport with the horse and produce the best canter they can from the horse to benefit the jumping ability.

When riding cross country the learner should take into account the going and terrain. The learner should be competent with either cross country on grass or arena eventing on a surface, as either scenario could be used depending on weather and going. It is not necessary to ride at the speed required for competition, however the learner should be able to ride the horse in a well-balanced canter suitable for schooling cross country.

ℹ️ TOP TIP

Please ensure you and the learner are aware of the current dress code for BHS assessments and the accepted hat and body protector standards **www.bhs.org.uk/careers-recreational-awards/assessments-information/dress-guidance/**

TRAINING TIPS

✓ The learner should have experience riding a variety of horses (age, temperament, level of schooling)

✓ The learner should have experience bringing on young horses and the ability to discuss this confidently

✓ Training should include asking the learner for feedback and to evaluate their horse's way of going and their own performance

✓ Training could include shadowing a dressage judge or course builder

✓ If the learner is taking the Eventing unit encourage them to join in with a cross country course walk – many top events offer this usually with a top rider

LO1. Understand the training of young horses

> **SKILLS RECORD SIGN OFF REQUIREMENT**
>
> Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demands of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 1.1: Explain a range of methods of training horses from birth to riding away

The learner should be able to **explain** the different methods involved when training horses.
Methods to include:

- Learning theory
- Appropriate introduction of equipment and tack
- Leading in hand
- Lungeing
- Long reining
- Initial backing process
- Using assistance
- Field and stable care
- In hand showing
- Young horse evaluations
- Travelling

Example depth and level of knowledge

Learning theory:

Learning theory explains how and why animals learn. Learning theory acknowledges the animal's behaviours and psychology, so that the right experiences can be used to facilitate learning. The correct use of learning theory therefore eliminates the potential for confusion by inaccuracies in training.

The basic learning processes in learning theory are:

- *Habituation*
- *Sensitization*
- *Shaping*
- *Classical conditioning*
- *Operant conditioning*

Sensitization *is where the reaction by the horse becomes increased or more intense.*
Habituation *is the opposite of sensitization.*
Classical conditioning *is the forming of an association between two stimuli.*
Operant conditioning *describes the way in which a horse learns by consequences, therefore it can be explained as a type of cause & effect learning.*
Shaping *is the process of establishing a behaviour that is not currently learned or performed by an animal. It is a procedure that involves rewarding or reinforcing behaviours that are progressively closer to the desired 'target' behaviour.*

In understanding the beginnings of learning theory, it is easy to see how the horse may become distressed or confused by blurred/ unclear aids. This can then compromise performance (for instance the horse offering canter rather than producing lengthened strides) or more importantly, welfare and safety (the horse becomes distressed enough to rear following incorrectly timed and applied aids for rein back).

Horses thrive on predictability and habit. If our training of young horses is as predictable and consistent as possible, by utilising learning theory in every session, then they should never be restricted by confusion, tension or distress.

Assessment Criteria 1.2: Explain the training of young horses

The learner should be able to **explain** what is required of a young horse during the initial stages of their ridden work, to include:

- Directional control
- Moving forward
- Transitions
- Responding to the leg and rein aids
- Rhythm
- Bend/straightness
- Hacking out
- Variation of training
- Rest periods and down time

Example depth and level of knowledge

Hacking out:

A reliable hacking companion will be needed. It is advisable to use the same routes initially to build confidence. Hacking will help the balance of the young horse and it will also increase the mental fitness of an immature horse. Hacking out encourages the horse to travel forwards. Taking most difficulties in training out of the arena is usually beneficial – teaching lengthened strides and variation in pace in a field (ideally with an incline to lengthen the horse up) is another example.

Assessment Criteria 1.3: Explain the Training Scale

The learner should be able to **explain** the training scale in relation to training horses.

Training Scale:

- Rhythm
- Suppleness/relaxation
- Contact
- Impulsion
- Straightness
- Collection

Example depth and level of knowledge

The Training Scale should be approached in order from rhythm to collection, but at times can be interchanged. The scales should improve and be of a higher standard as the horse progresses their training.

Rhythm
There must be regularity within the beat of each gait, i.e. four clear beats in walk, two in trot and three in canter.
The footfalls must be even and regular and should have an obvious beat.
Once the young horse is moving forwards freely when ridden they should be encouraged to work in rhythm. Without rhythm the subsequent stages of the Training Scale cannot be achieved.
As rhythm becomes more consistent so will the horse's balance. Rhythm can be achieved with consistent direction from the rider, but exercises such as pole work can also help.

LO2. Be able to ride safely

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Ready for Assessment

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment**

day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.

Assessment criteria 2.1: Maintain health, safety and welfare of horse, self and others

The learner should show regard for health, safety and welfare of self, others and horses throughout all riding sessions, to include:

- Ride with consideration for other users of the school space
- Consideration of individual horses

The learner will be working in open order for all riding sessions.

LO3.Understand how to progress the training of a dressage horse

🛡 SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement.

- ✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria
- ✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**
- ✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 3.1: Describe the requirements of dressage tests from Intro to Elementary

Description of requirements to include:

- Content at each level
- Progression route
- Variations in tack and equipment
- Different competition opportunities

Example depth and level of knowledge:

The purpose of the Introductory level is to introduce the rider and/or horse to the sport of dressage. Some riders may choose to start at Prelim level, however Intro provides the opportunity to compete without having to canter.

British Dressage (BD) Intro tests include the following:

- *Medium walk*
- *Free Walk*
- *Working Trot – rising – 20 meter circles & changing of rein across the diagonal*
- *Halts – halt through walk*
- *Working canter (not required in all tests)*

The progression from Intro would be to Prelim level dressage.

Tack requirements*:

- *Dressage legal snaffle bit*
- *Cavesson, drop, flash or grackle noseband (Micklem bridles are permitted. Clips on Micklem bridles are not permitted)*
- *Breastplates are permitted*
- *Martingales are not permitted*
- *Neck strap is permitted*

(more detail can be found in the BD rulebook)

Affiliated competitions are run through BD. To compete, the rider must be a member of BD. If the horse is not owned by the rider the owner of the horse will also need membership

with BD. Riders can compete on a ticket if not a member.

Opportunities to compete unaffiliated are also provided through British Riding Clubs, the Pony Club and private competitions.

*Correct at time of going to print

Assessment Criteria 3.2: Analyse the effect of a range of school movements on a dressage horse's performance

The learner should be able to **analyse** the effect of school movements by explaining;
- The reasons why the movement creates improvement
- Situations when a movement may not be beneficial

School movements to include:
- Turn about / on the forehand
- Leg yield
- Shoulder fore / in
- Pirouettes in walk
- Counter canter

Example depth and level of knowledge

Counter canter:
Counter canter helps to develop obedience, suppleness and straightness.
Obedience – *the horse is required to be attentive to the rider's aids in order to maintain the counter canter and not to fall back to trot, become disunited or try to change canter lead.*
Suppleness – *The horse is required to maintain the bend to the leading leg so is required to look to the outside of the curve, as such it is a suppling and stretching exercise – improvement should be felt when the horse returns to true canter when the rein is changed.*
Straightness – *A common problem in the canter is that the horse's quarters fall to the outside, this often occurs because a horse is wider in the quarters than at the forehand. As the horse takes slight bend to the outside in counter canter this helps to improve straightness and the rider may also become more aware of their aids in maintaining counter canter and as a result ride with more control of the quarters when in true canter.*

It is beneficial to establish counter canter before beginning to teach the horse changes. If a horse can do flying changes they are more likely to attempt to change the leg in counter canter to evade the exercise.

Counter canter should only be used where a horse has established rhythm and balance in the canter on both reins. Introducing counter canter too early could cause confusion to a horse that is not sufficiently established in canter.

Assessment Criteria 3.3: Explain potential problems in the horse's way of going and methods to overcome them

Potential problems to include:
- Irregular paces
- Loss of balance, rhythm
- Lack of acceptance of contact
- Stiffness on either rein

Methods to overcome to include consideration of:
- Choice of work
- Choice of exercises

The learner should be able to **explain** the potential problem; how this may occur, what effect it would have on future training if continued (not resolved), and how they should overcome the problem. They should be able to describe different types of work and exercises to include in the training to overcome the problem. They should also show a consideration for checks such as teeth, saddle etc from the recognition of the problem.

Example depth and level of knowledge

Lack of acceptance of contact:

Problems could include; leaning on the bit, fussiness/lack of stillness in the mouth, the horse coming behind the bit.
The first action to take for all of these situations is to ensure the horse is not experiencing any pain in their mouth or back. The horse's teeth, tack and back should be checked.

Leaning on the bit *– This is usually caused by the horse working 'on the forehand'. During schooling transitions can used to help to engage the horse's hind quarters. Shoulder in can also be useful for helping to lighten the forehand.*

Fussiness or lack of stillness in the mouth
Lungeing the horse in side reins can help the horse to accept the contact. This can be beneficial as the horse can begin to establish their balance without the interference of a rider. During ridden sessions the rider will need to ensure they maintain a still contact with the hand.
The horse needs to be encouraged to work through from behind, this can be achieved by consistently riding the horse forward through smooth transitions and through school figures maintaining a consistent rhythm.

Horse behind the bit *– Similar to above the horse needs to be ridden consistently forwards into a steady contact. Pole work can help the horse to stretch forward through their head and neck. Lengthening the strides in trot and canter can also encourage the horse to stretch forwards into the contact. Encouraging the horse to stretch forwards and down for relaxation at points within the session is another useful way to encourage the horse to seek the contact forwards.*

Assessment Criteria 3.4: Describe variations within the pace

The learner should be able to **describe** the four variations for each pace.

Example depth and level of knowledge

Trot:

Collected trot: *The collected trot has shorter strides than the working trot, but with increased lightness and mobility of the shoulders. The hocks, being well engaged and flexed, must maintain an energetic impulsion, enabling the shoulders to move with greater mobility, thus demonstrating complete self carriage. The horse, remaining on the bit, moves forward with the neck raised and arched. Although the horse's strides are shorter than in the other trots, elasticity and cadence are not reduced – in fact cadence, in particular, should be increased. The horse does not track up.*

Working trot: *This is a trot between the collected and medium variants, used when the horse's training is not yet developed enough for these other forms. In a good working trot, the horse shows proper balance and, remaining on the bit, goes forward with even, elastic steps, with his hocks pushing under his body. The horse tracks up.*

Medium trot: *This is a moderate lengthening of strides compared to the extended trot, but 'rounder' than the latter. Without hurrying, the horse goes forward with clearly lengthened strides and with impulsion from the hindquarters. The rider allows the horse to carry his head a little more in front of the vertical than at the working trot, and to lower his head and neck slightly. The steps should be even, and the whole movement balanced and unconstrained. The horse overtracks.*

Extended trot: *While remaining balanced and on the bit, the horse lengthens his frame and the stride as a result of greater impulsion from the hindquarters. The horse should cover as much ground as possible whilst maintaining the same tempo. In the forward movement*

of the extension, the movement of the fore and hind legs should be equal. The horse overtracks.

Assessment Criteria 3.5: Analyse the effect of transitions on a dressage horse's performance

The learner should be able to **analyse** the effect of transitions by explaining;
- The reasons why transitions create improvement
- When transitions may not be beneficial

Effect of transitions to include:
- Developing the half halt
- Transitions between paces
- Transitions within the pace
- Direct transitions for example, walk to canter

Example depth and level of knowledge

Developing the half halt:
Transitions improve engagement, balance and responsiveness.
Engagement and balance *– The horse naturally carries more weight on their forehand, for riding we require the horse to carry more weight on their hind quarters. Transitions engage the horse's hindquarters to help to achieve this, which improves their balance when ridden and enables greater manoeuvrability.*
Responsiveness *– Riding transitions encourages the horse to focus on the rider's aids and as a result they often become more responsive. Some horses can switch off from the rider; transitions are a useful tool to prevent this from happening.*

The half halt increases the attention of the horse, helps to engage the hind quarters and notifies the horse the rider is about to ask something of him.

The half halt can be developed in trot by asking the horse to walk for a specified number of strides before trotting again. The number of strides can then be reduced so eventually the horse is walking for one stride then trotting again. This can then be refined further so the rider moves the horse off before it actually walks, eventually the rider will be able to apply the same aids more subtly to achieve a half halt.

Assessment Criteria 3.6: Plan a work schedule for a dressage horse

The learner should be able to discuss a work schedule to develop a dressage horse, for example, from Prelim to Novice or Novice to Elementary.
Work schedule to include:
- Short term (one month) and medium term (six months)
- Fitness work for dressage horses
- Cantering outside

Example depth and level of knowledge

To progress a horse from Novice to Elementary:
The horse will need to begin to take more weight behind, raising and lightening the forehand with periods of work in a shortened frame. The horse should become more obedient to rider's aids. Exercises may become more challenging and more closely connected. Smaller school figures in balance and rhythm can be included in the work. The horse should also be working to be able to perform movements in quicker succession and linked more seamlessly. The horse will need to be introduced to the lateral work required and counter canter, beginnings of collection and lengthening the stride – medium trot for example.

The work schedule should be varied, for example, hacking, schooling, jumping, lungeing and other forms of exercise if available (horse walker, treadmill). Work should be introduced progressively; as the

fitness and muscle tone improve the intensity of the work can increase. Regular turnout is essential.

LO4. Understand how to progress the training of a show jumping horse

SKILLS RECORD SIGN OFF REQUIREMENT
Trainer Endorsement.

✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria

✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**

✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 4.1: Describe the requirements of different show jumping categories/levels

Description of requirements to include:
- Content at each level (types of jumps, height and distances)
- Progression route
- Variations in tack and equipment
- Different competition opportunities

Example depth and level of knowledge

Discovery:
British Showjumping (BS) classes offer you the opportunity to qualify for a second round, and then to qualify for the final. You need to achieve four double clears to qualify for second round competitions.
This then earns you three chances to compete in second round competitions to gain a chance to qualify for the final.
The maximum height in a Discovery class is 1m. If you qualify for the second round the height of the jumps increase to a maximum height of 1.05m. Jumps will include; uprights, oxers, combinations, various fillers and may include a water tray.

BS classes start at British Novice, then Discovery, followed by Newcomers and then Foxhunter before progressing to higher level competitions.

Tack requirements*
- Running and standing martingales are permitted (latter must only be attached to the cavesson part of a noseband)
- Most bits are acceptable
- Pelham and curbs bits with curb chains have some restrictions to adhere to (details in rule book)
- Market Harborough and running or check reins are not permitted
- Tongue straps are not permitted
- Blinkers are not permitted

To compete at BS affiliated competitions, riders must be a member of BS. If the horse is not owned by the rider the owner of the horse will also need membership with BS. Riders can compete on a ticket if not a member.

Opportunities to compete are also provided through British Riding Clubs, The Pony Club and private competitions.

*Correct at time of going to print

Assessment Criteria 4.2: Outline a training programme for introducing a horse to jumping

Through the discussion, the learner should be able to provide the outline for a training programme, to include:

- Understand relevance of the Training Scale
- Use of poles; individual, trot, canter, placing
- Introduce a fence following the pole exercise
- Ability to ride on all surfaces including grass

Example depth and level of knowledge:

Good training should always begin with consideration of basic principles, for example rhythm should be established in all paces. There might be particular emphasis in the canter as this is the most important pace for jumping horses. A horse should be schooled to be supple and responsive to both the leg and the rein aids. They should be able to bend right and left and be ridden straight. The horse should engage from behind and move well forward with impulsion. When introducing jumping, start first with a single pole on the ground, before progressing to three poles, when the horse is comfortable working over poles a cross pole can be introduced. Following this upright fences and spread fences can be introduced. The horse can then begin to link fences together building up to a simple course. The horse will need to be introduced to doubles, related distances, fillers and grid work. The amount of time taken to work through this process will vary depending on each individual horse.

Assessment Criteria 4.3: Explain potential problems and suggest methods to overcome them

Potential problems may include:

- Irregular paces
- Loss of balance, rhythm
- Inappropriate speed
- Lack of adjustability between obstacles
- Poor quality of turns and approach to fences

Methods to overcome to include consideration of:

- Choice of work
- Choice of exercises

The learner should be able to **explain** a potential problem; how this may occur, what effect it would have on future training if continued (not resolved), and how they should overcome the problem. They should be able to describe different types of work and exercises to include in the training to overcome the problem. They should also show a consideration for checks such as teeth, saddle and back.

Example depth and level of knowledge

Inappropriate speed:

Rushing to fences can be a result of over exuberance from the horse but usually occurs as a result of lack of confidence from the horse. To overcome this problem the horse should be able to gain confidence by jumping regularly over small, simple obstacles. Height and complexity can be increased progressively as the horse gains confidence. Other exercises that can be used include:

- *Circle in front of a fence until the horse settles into a rhythm and only then allow the horse to jump*
- *Trotting poles can be used in front of a fence*
- *Jumping on a circle with a short approach*
- *Working on the consistency of maintaining the quality of the canter – throughout course. A horse that loses impulsion around corners will rush to the fences.*

If not resolved this will likely to result in knock downs and refusals at competitions. It can also be dangerous for both horse and rider to continue jumping.

Assessment Criteria 4.4: Evaluate the value of grid work

The learner should be able to **evaluate** grid work for the horse including:

- Development of the horse's jumping skills
- Improving straightness
- Regulating length of stride
- Building confidence
- Improving technique

Example depth and level of knowledge

Building confidence
Grid work can be used for all levels of horse that have been introduced to jumping.

For grid work the fences are set out at a prescribed distance. This means that the rider only needs to set the horse up for the approach to the first fence and then maintain the impulsion through the grid.
If the horse has been set up correctly at the first fence they should be able to continue through the grid with relative ease, in a good rhythm. The horse will often gain confidence through a grid and the size of some fences can be increased if the session is going well, further building a horse's experience and confidence.

If grids are not set at suitable distances, or suitable exercises used, this will be detrimental to a horse's confidence. Consideration should be paid to situations where more than one horse is using a grid, horses must be of a similar stride length.

Assessment Criteria 4.5: Plan a training schedule to progress a horse to show jumping 1.10m

Training schedule to include:
- Pole exercises
- Grid exercises
- Introduction of canter poles
- Further improvement of the horse's way of going on the flat
- Referenced to the Training Scale

Example depth and level of knowledge:

To progress to 1.10m classes the horse would need to have been introduced to; water trays, different types of fences (style, triple bar, offset fences), flowers on the side of the fences and banners (ringside). Poles on the ground can be used for related distances and dog legs, exercises can be made progressively difficult by lengthening and shortening distances. Competing at unaffiliated shows initially can be beneficial. Raise the height and width of fences at home in a progressive way. Improve the quality of canter so the horse can sit more (improve impulsion). Practicing for jump offs (tighter turns, length of stride, shorter approaches), will be required.

The work schedule should be varied, for example, hacking, schooling, jumping, lungeing and other forms of exercise if available (horse walker, treadmill). Work introduced should be progressive; as the fitness and muscle tone improve the intensity of the work can increase. Regular turnout is essential.

Assessment Criteria 4.6: Explain factors that influence the distances between fences

The learner should have a working knowledge of the adjustments of the distances between doubles, combinations, grids and related fences depending on different factors.

Factors to include:

- Trot and canter approaches
- Dealing with different length of stride
- Reasons and needs for shorter and variable schooling distances
- Competition rules
- Terrain, for example; grass or surface, uphill, downhill, distance to or from a corner, going
- Knowledge of jump distances

Example depth and level of knowledge

Reasons and needs for shorter and variable schooling distances:

The horse needs to have an adjustable stride for jumping to be able to make distances and jump different types of obstacles. Different horses will naturally have different stride lengths, and the horse should be prepared in training for the length of stride required in competition. Distances may be set at competition that are slightly short or slightly long for a particular horse. The rider will need to identify this when walking the course and then ride the horse appropriately through the combination.

A useful exercise to use when schooling is to set a distance e.g. 5 strides between two fences and then practise shortening the horse to 6 strides and lengthening to 4 strides. To achieve this the distance between the fences could be set at 21m. It is important that a horse is ridden between the leg and hand and is responsive to the aids in order that they may use their body to best effect.

LO5. Be able to ride a trained horse in a double bridle to develop its way of going

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Ready for Assessment

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

> **ⓘ TOP TIP**
> Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

At the Stage 4 Senior Ride for Training (Eventing and Dressage) assessment the learner will be assessed on learning outcomes 5 and 6 during one session. They will ride each horse for approximately 30 minutes and discuss each horse with the assessor.

Assessment Criteria 5.1: Ride in an influential balanced position

The horse will be working up to Elementary level. The learner should assess the horse's paces, balance, straightness and suppleness. They should show some lateral work and movements used in an Elementary test. Throughout their work they should maintain an influential balanced position to include:

- Showing a secure balanced position whilst maintaining integrity of the aids
- Riding forwards to a receiving rein aid with rhythm, bend and straightness within a working frame appropriate to the horse's level of training
- Demonstrate empathy and feel

Assessment Criteria 5.2: Evaluate the horse's way of going in line with the Training Scale

The learner will be asked to **evaluate** the horse they have ridden to include the points listed below. They should discuss the horse's good qualities as well as areas they think could be improved. They should be able to identify the level of competition the horse could compete at and where the horse would gain high or low marks.

Way of going to include:
- Pace
- Balance
- Gymnastic ability (movements)
- Attitude/rideability
- Technique

Assessment Criteria 5.3: Use exercises to develop the horse

Based on the learner's assessment of the horse they should be able to select exercises to progressively develop the horse.

Appropriate exercises may include:
- Dressage movements to Elementary level
- Transitions within paces
- Direct transitions
- Lateral work

Assessment Criteria 5.4: Evaluate the effectiveness of the exercises carried out

The learner should be able to **evaluate** the exercises they have used; they should discuss what worked well and what may not have been as effective.
Evaluation should include:
- Reasoning for the selection of the work
- Effectiveness of the work

Assessment Criteria 5.5: Justify a plan of work to develop the horse's training

The learner should discuss what they would like to develop with the horse to progress its training if they were given the horse for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.
Plan to include:
- Future possible work; short term (one month), medium term (six months)
- Use of alternative work programmes which may include lungeing, hacking and outside work
- Progression for future work

LO6. Be able to ride an inexperienced dressage horse with a view to developing its way of going

SKILLS RECORD SIGN OFF REQUIREMENT

Ready for Assessment

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

TOP TIP

Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

Assessment criteria 6.1: Ride in an influential balanced position

The learner will ride an inexperienced dressage horse. This horse may be a young horse or may be a mature horse that requires schooling. The learner should assess the horse's paces, balance, straightness and suppleness. They should use lateral work, school figures and movements to assess the horse's current level of education.

Throughout their work learners should maintain an influential balanced position to include:

- Showing a secure balanced position whilst maintaining integrity of the aids
- Riding forwards to a receiving rein aid with rhythm, bend and straightness within a working frame appropriate to the horse's level of training
- Demonstrate empathy and feel

Assessment Criteria 6.2: Evaluate the horse's way of going in line with the Training Scale

The learner will be asked to **evaluate** the horse they have ridden to include the points listed below. They should talk about the horse's good qualities as well as areas they think could be improved. They should be able to identify the level of competition the horse could compete at and where the horse would gain high or low marks.

The **evaluation** of the horse should be done with reference to the Training Scale, evaluation of way of going to include:

- Pace
- Balance
- Gymnastic ability (movements)
- Attitude/rideability
- Technique

Assessment Criteria 6.3: Use exercises to develop the horse's responsiveness to the aids

Based on the learner's assessment of the horse they should be able to select exercises to progressively develop the horse. Exercises should be appropriate to the horse's level of training.

Exercises may include:
- Transitions
- School figures
- Lateral work
- Lengthening and shortening stride

Making reference to:
- Suppleness
- Impulsion
- Straightness

Assessment Criteria 6.4: Evaluate the effectiveness of the exercises

The learner should be able to **evaluate** the exercises they have used, they should discuss what worked well and what may not have been as effective.
To include:
- Reasoning for the selection of the work
- Effectiveness of the work

Assessment Criteria 6.5: Justify a plan of work to develop the horse's training

The learner should discuss what they would like to develop with the horse to progress its training if they were given the horse for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.

Plan to include:
- Future possible work; short term (one month), medium term (six months)
- Use of alternative work programmes which may include lungeing, hacking and outside work
- Alternative venues

LO7. Be able to ride an experienced horse over show jumps up to 1.10m (3ft 7ins) with a view to developing its way of going

⬢✎ SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

⬢ TOP TIP
Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

Assessment criteria 7.1 Evaluate the horse in preparation for show jumping

The learner will work the horse in, this should include the use of two or three fences.

Throughout this work the learner will **evaluate** some or all of the following through a progressive assessment:

- Assess horse in all paces
- Change pace between fences

- The horse's responsiveness to the aids
- Ability to influence the canter
- Horse's balance through turns and corners
- Horse's jumping skill (strengths/weaknesses)
- Jumping from trot and canter
- Use of a placing pole
- Relating fences

Assessment Criteria 7.2: Ride the horse over a range of fences

The learner will then jump the horse, they will either;

a) Jump the course of fences as numbered or,

b) Use the fences as they wish to school over and assess the horse or,

c) Plan their own course and jump it.

Throughout their work they should:

- Relate fences to show understanding of training and the process for jumping a course
- Show influence, control and confidence
- Show a balanced, secure and influential position that has a positive effect

Assessment Criteria 7.3: Evaluate the work undertaken

The learner should be able to **evaluate** the work they have done with the horse, they should discuss what went well and what could be improved.
The evaluation may include the horse's:

- Paces, forwardness, attitude
- Softer/stiffer side
- Ease of movement
- Stronger and weaker movements
- Quality of Jump
- Response to the aids
- Reference to the Training Scale

bhs.org.uk/pathways

Assessment Criteria 7.4:
Justify a plan of work to develop the horse's training

The learner should discuss what they would do with the horse to progress its training if they were given the horse for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.

Plan to include:

- Future possible work, short term (one month) and medium term (six months)
- Use of grids and gymnastic exercises to improve the horse's technique
- Use of alternative work programmes which may include lungeing, hacking and outside work
- Flatwork exercises
- Progression towards jumping 1.15m

LO8. Be able to ride a horse cross country over fences up to 1m (3ft 3ins) with a view to developing its way of going

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📝 SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

ⓘ TOP TIP

Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

Assessment criteria 8.1
Evaluate the horse in preparation for cross country

The candidate will work the horse in. This should include the use of warm up cross country fences.
Throughout this work the candidate will **evaluate** the following:

- The horse's way of going in all paces
- Change of pace between fences
- The horse's responsiveness to the aids
- Ability to influence the canter
- Horse's balance through turns and corners
- Horse's jumping skill (strengths/weaknesses)
- Moving the horse faster

Assessment Criteria 8.2:
Ride the horse over a range of cross country fences

The learner should ride the horse in a well-balanced canter with rhythm which would be suitable for schooling cross country. Learners are not expected to ride at the speed that would be required when competing. When riding the course the learner should take into account the terrain, going and types of fences.

The learner will then jump the horse, they will either;

- a) Jump the course of fences as numbered or,
- b) Use the fences as they wish to school over and assess the horse or,
- c) Plan their own course and jump it.

During this session the candidate should:
- Make a progressive assessment
- Jump independent fences
- Relate fences to show understanding of training and the process for jumping a course
- Show influence, control and confidence
- Show a balanced, secure and influential position that has a positive effect

The course will include at least three of the following:
- Angles
- Corners, skinnies, arrowheads
- Ditch
- Steps, drops
- Water

Assessment Criteria 8.3: Evaluate the work undertaken

The learner should be able to **evaluate** the work they have done with the horse. They should discuss what went well and what could be improved.

The **evaluation** may include the horse's:
- Paces, forwardness, attitude
- Rhythm, bend, straightness, outline
- Softer/stiffer side
- Ease of movement
- Quality of jump
- Response to the aids
- Reference to Training Scale

Assessment Criteria 8.4: Justify a plan of work to develop the horse's training and confidence

The learner should discuss what they would do with the horse to progress its training if they were given the horse for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.

Plan to include:
- Future possible work, short term (one month), medium term (six months)
- Use of grids and gymnastic exercises to improve the horse's technique
- Use of alternative work programmes which may include lungeing, hacking and outside work
- Flatwork exercises
- Progression to Novice Horse Trials (to include introducing different types of cross country fences used in this level of competition)

LO9. Be able to ride horses used for training others, with a view to developing their way of going

SKILLS RECORD SIGN OFF REQUIREMENT

Ready for Assessment

✓ This learning outcome is assessed on the assessment day
✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

TOP TIP

Learners will ride two horses (each for 30 minutes) to cover this learning outcome. They will discuss each horse with their assessor.

Learners completing Unit 5: Ride for Training Dressage will ride, one horse on the flat and one horse over poles and/or floor patterns. Learners completing Unit 6: Ride for Training Show Jumping will ride one horse over poles and/or floor patterns and one horse over fences. All assessment criteria relates to both horses, except for 9.3 and 9.4.

Assessment criteria 9.1: Ride in an influential balanced position

The learner will ride two horses that are used for training others. These horses may be riding school or college horses used for training clients and students. The learner should assess the horses' paces, balance, straightness and suppleness. They should show some work and school movements/figures to assess the horses' level of training.

Throughout their work they should maintain an influential balanced position to include:

- Maintaining a secure balanced position whilst maintaining integrity of the aids
- Riding forwards to a receiving rein aid with rhythm, bend and straightness within a working frame appropriate to the horse's level of training
- Demonstrate empathy and feel

Assessment Criteria 9.2: Evaluate the horses' way of going in line with the Training Scale

The learner will be asked to **evaluate** the horses they have ridden to include the points listed below. They should talk about the horse's good qualities as well as areas they think could be improved. The learner should be able to discuss the horse's current level of training and the type of clients and students the horse would be suitable for.

The **evaluation** of the horse should be done with reference to the Training Scale and way of going to include:

- Pace
- Balance
- Suppleness
- Attitude/rideability
- Technique

Assessment Criteria 9.3: Use exercises to develop the horse's responsiveness to the aids

Based on the learner's assessment of the horse they should be able to select exercises to progressively develop the horse. Exercises should be appropriate to the horse's level of training and should focus on improvement in suppleness, impulsion and straightness.
As part of Unit 5 Ride for Training Dressage, exercises may include:

- Transitions
- School figures
- Lateral work
- Lengthening and shortening stride

As part of Unit 6 Ride for Training Show Jumping, exercises may include:

- Related distances
- Grid work

All, should show consideration to:

- Suppleness
- Impulsion
- Straightness

Assessment Criteria 9.4: Use poles to develop the training of the horse

The learner should use poles and/or floor patterns with one of the horses they ride. A maximum of 7 poles can be used. Helpers will be available to assist with the moving of poles, but the learner should be able to instruct the helper with regards to the spacing of poles.

Within the session they may show how to:
- Incorporate poles into training
- Use of pole work for jump training (Show Jumping unit only)
- Use different pole exercises

Assessment Criteria 9.5: Evaluate the effectiveness of the work

The learner should be able to **evaluate** the work they have done with each horse, they should discuss what went well and what could be improved.

The **evaluation** may include:
- Reasoning for the selection of the work
- Effectiveness of the work

Assessment Criteria 9.6: Justify a plan of work that develops the horses' training

The learner should discuss what they would like to develop with the horses to progress their training if they were given the horses for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.

Plan to include:
- Future possible work; short term (one month), medium term (six months)
- Use of alternative work programmes which may include lungeing, hacking and outside work

LO10. Be able to ride an inexperienced horse over show jumps up to 1m (3ft 3ins) with a view to developing its way of going

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

TOP TIP

Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

Assessment criteria 10.1: Evaluate the horse in preparation for jumping

The learner will ride an inexperienced show jumping horse. This horse may be a young horse or may be a mature horse that requires schooling. The learner will work the horse in; this should include the use of two or three fences.

The learner should ride the horse showing a progressive assessment. Throughout this work the learner will **evaluate** some or all of the following:
- The horse's way of going in all paces
- Change of pace between fences
- The horse's responsiveness to the aids
- Ability to influence the canter
- Horse's balance through turns and corners
- Horse's jumping skill (strengths/weaknesses)
- Jumping from trot and canter

Assessment Criteria 10.2: Ride the horse over a range of fences

The learner will then jump the horse, they will either;

a) Jump the course of fences as numbered or,

b) Use the fences as they wish to school over and assess the horse or,

c) Plan their own course and jump it.

Throughout their work they should relate fences to show understanding of training and the process for jumping a course.

Range of fences to include:

- Combinations
- Related distances
- Uprights
- Spreads/oxers

Assessment Criteria 10.3: Ride in an influential balanced position

Throughout their work the learner should maintain an influential balanced position to include:

- Jumping the horse with a well-balanced, secure and influential position that has a positive effect
- Showing influence, control and confidence
- Demonstrating empathy and feel

Assessment Criteria 10.4: Evaluate the work undertaken

The learner should be able to **evaluate** the work they have done with the horse. They should discuss what went well and what could be improved.

The **evaluation** may include the horse's:

- Paces, forwardness, attitude
- Rhythm, bend, straightness, outline
- Softer/stiffer side
- Ease of movement
- Stronger and weaker movements
- Reference to the training scale
- Response to the aids
- Gymnastic ability

> **ℹ TOP TIP**
>
> The evaluation should make reference to the Training Scale.

Assessment Criteria 10.5: Justify a plan of work to develop the horse's training

The learner should discuss what they would like to develop with the horse to progress its training if they were given the horse for a period of time. They should be able to **justify** their plan by giving reasoning for the work chosen.

Plan to include:

- Future possible work; short term (one month), medium term (six months)
- Use of alternative work programmes which may include lungeing, hacking and outside work
- Progression towards 1.10m

SECTION 4: SENIOR RIDE

SECTION 5
UNIT 7
COACHING EVENTING

UNIT 8
COACHING DRESSAGE

UNIT 9
COACHING SHOW JUMPING

To sign off the **Ready for Assessment** and **Trainer Endorsement** forms within the learner's Skills Record for this unit you must have achieved the Performance Coach BHSI, Senior Coach or a Performance Coaching section. Please note, you can only sign off a **Trainer Endorsement** or **Ready for Assessment** within the discipline you hold a BHS qualification/section for (if you have achieved the Senior Coach or Performance Unit 10: Coaching Event Disciplines and Unit 9: Coaching presentation you can sign off all coaching parts of the Skills Record). If you have achieved Performance Unit 11: Coaching Dressage or Performance Unit 12: Coaching Show Jumping in addition to Unit 9, you can sign off any dressage or show jumping related Trainer Endorsements or Ready for Assessment respectively.

LEARNING OUTCOME COMBINATIONS FOR COACHING UNITS

This section guide covers all the learning outcomes required for all three Stage 4 Senior Coaching units. Not all learning outcomes are required to be completed for each unit. The table below outlines the learning outcomes required to be completed for each unit.

LEARNING OUTCOME	UNIT		
	UNIT 7: STAGE 4 SENIOR COACHING EVENTING	UNIT 8: STAGE 4 SENIOR COACHING DRESSAGE	UNIT 9: STAGE 4 SENIOR COACHING SHOW JUMPING
LO1. Understand how to coach	✓	✓	✓
LO2. Be able to coach safely	✓	✓	✓
LO3.Be able to communicate effectively whilst coaching	✓	✓	✓
LO4. Be able to coach a rider on the lunge	✓	✓	✓
LO5. Be able to coach a group of riders using poles		✓	✓
LO6. Be able to coach a group of riders over fences up to 1m (3ft 3ins)	✓		
LO7. Be able to coach a private show jumping lesson in preparation for a 1.10m (3ft 7ins) competition			✓
LO8. Be able to coach a semi private lesson using grid work or related fences up to 1m (3ft 3ins)			✓
LO9. Be able to coach a private dressage lesson at Elementary level	✓	✓	
LO10. Be able to coach a semi private arena eventing lesson over fences up to 1.10m (3ft 7ins)	✓		
LO11. Be able to coach a semi private dressage lesson at Novice Level		✓	

GENERAL GUIDANCE FOR THE COACHING ASSESSMENTS

Learners will be required to assess the horse and rider partnership and be able to coach to develop the partnership utilising suitable exercises. It is not compulsory to bring lesson plans to the assessment, however it should be clear that the learner is working to a structured plan within their lessons.

Health and safety is important in all lessons and the area, tack, equipment and exercises should be considered in all lessons.

The learner will be expected to offer feedback to the riders and clear communication skills should be demonstrated through all lessons. A good rapport should be established early on in the lessons to get the best from the horses and riders. The learner will also have a short discussion with the assessor after each lesson and provide an evaluation of the lesson and their own performance.

> ### 🛈 TOP TIP
> Please ensure you and the learner are aware of the current dress code for BHS assessments
> **www.bhs.org.uk/careers-recreational-awards/assessments-information/dress-guidance/**

TRAINING TIPS

- ✓ Observe the learner as often as you can providing structured feedback for them to reflect upon and improve
- ✓ A range of clients and horses should be available to the learner
- ✓ Encourage the learner to attend coaching demonstrations and workshops to be able to observe experienced coaches. Observing different coaches will help to identify different coaching styles and will give new lesson ideas for the learner to bring into their lessons
- ✓ If there is a weak area for the learner find targeted CPD that will help to develop this area

LO1. Understand how to coach

> ### 🛡 SKILLS RECORD SIGN OFF REQUIREMENT
> Trainer Endorsement.

- ✓ This learning outcome is assessed by the trainer. The learner's Skills Record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria
- ✓ **Ensure the 'Trainer Endorsement' form in the learner's Skills Record is completed before the assessment day; this records that an assessment with the trainer has taken place**
- ✓ The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.

Assessment Criteria 1.1: Explain techniques used in coaching

The learner should be able to **explain** the following coaching techniques:
- Behaviour management
- Mentoring
- Methods of evaluating performance
- Motivational techniques
- Profiling
- Goal setting
- Annual development plan

Example depth and level of knowledge

Goal setting:

- *Goals need to be strategic and well planned to allow a short, medium and long-term plan to be developed. Short-term: four to eight weeks. Medium-term: two to six months. Long-term: six months to one year or more*
- *There may be several people that should be considered or consulted when goal setting these may include; the rider, partner, horse's owner, sponsor, parents, coach, vet and farrier*
- *SMART acronym can be used to set goals*
- *Once the goals have been set, they can then be broken down into smaller targets. The targets and goals then need to be mapped out against other factors, these may include; farrier and vet appointments, personal fitness programme, personal commitments or work/school commitments. Once such issues have been considered the targets and goals can be set around them*
- *For major goals to be achieved they must be set and worked backwards from. This will allow a clear vision of education and improvement to take place*
- *Each of the targets set to reach the goals then need a clear plan of work to achieve them. This can take the form of lesson plans, team discussions, fitness plans for horse and rider and regular meetings*
- *All plans should be recorded so that they can be used for reference should an issue occur. These can be used to restructure the work plan to continue towards the goals set.*

Assessment Criteria 1.2: Explain factors which impact on coaching approaches

The learner should be able to **explain** how the following factors impact on how they coach:

- Learning styles
- Personalities
- Challenges, learner's mind set
- Equality and diversity
- Environment
- Long term participant development

Example depth and level of knowledge

Learning styles:

We all display a mixture of learning styles, but most of us have a preference for one or two over the others. The main groups are:

- *Activists*
  Activists learn best when they are involved in new experiences, problems and opportunities.
  They learn less when they have to listen to lectures or long explanations, reading, writing or thinking on their own.
- *Reflectors*
  Reflectors learn best when they can observe, review what has happened and think about what they have learned. They learn less when they act as leader, have little time to prepare, are rushed or feel 'thrown in at the deep end'.
- *Theorists*
  Theorists learn best when they are put in complex situations where they have to use their skills and knowledge. They like to question and understand ideas behind theories.
  They learn less when the activity is unstructured or without knowing the principles or concepts involved.
- *Pragmatists*
  Pragmatists learn best when they have the chance to try out techniques with feedback, or are shown techniques with

obvious advantages (e.g. saving time). They learn less when there is no obvious or immediate benefit they can recognise or when there is no practice or guidelines on how to do it.

In addition we all also have another set of learning preferences based on how we like to receive new information. These are:

- *Visual Learners – learn best through demonstrations and diagrams*
- *Auditory Learners – learn best through explanations*
- *Kinaesthetic Learners – learn best through demonstrations and practising*

Identifying a client or student's preferred learning style is beneficial so that you can tailor coaching lessons to suit the individual.

LO2. Be able to coach safely

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

Assessment Criteria 2.1: Maintain the health, safety and welfare of self, horses and riders

The learner must risk assess for each coaching lesson to include:
- Hazards
- Control measures

The learner must demonstrate safe coaching in all lessons, including consideration of:
- Riding area and surfaces
- Equipment
- Tack, including balance and suitability of saddle
- Suitability of horse and exercises

TOP TIP
The learner is not expected to bring or complete a paper risk assessment. But a check of the above is expected, and discussed with the assessor if necessary.

LO3. Be able to communicate effectively whilst coaching

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment.**

This does not mean they will necessarily be successful in passing the assessment on the day.

Assessment Criteria 3.1: Demonstrate effective communication skills

The learner must show effective communication across all four coaching sessions.

Effective communication skills should be shown through:

- Voice; sufficient volume to be heard but not overbearing
- Active listening; listens to riders and acts on information received
- Mannerisms; positive and professional
- Body language; interested and engaging
- Clarity of explanation; easy to follow, specific to the level of rider
- Encouraging and providing feedback; provides feedback to highlight positive outcomes and identifies areas for improvement whilst providing encouraging advice.

LO4. Be able to coach a rider on the lunge

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment.**

This does not mean they will necessarily be successful in passing the assessment on the day.

> **ⓘ TOP TIP**
> Learners will have 30 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 4.1: Explain the benefits for riders of working on the lunge

The learner should be able to **explain** how lunge lessons can improve the following for the rider:

- Rider position
- Coordination
- Balance
- Core stability
- Developing feel and empathy

Assessment Criteria 4.2: Explain the requirements of a lunge horse

The learner should be able to **explain** the importance of the following for a lunge horse:

- Balance
- Behaviour
- Way of going
- Quality and suitability of stride
- Appropriate for level

Assessment Criteria 4.3: Assess the suitability of the horse for lungeing

Before starting the lesson the learner should lunge the horse to **assess** its responsiveness and way of going in preparation for the lesson. The assessment should include:

- Walk, trot, canter
- Working the horse on both reins

- Use of side reins
- Suitability for rider

Assessment Criteria 4.4: Ensure the horse is lunged using suitable techniques

The learner should show a good lunge technique throughout the lesson in order to deliver the lunge lesson effectively and safely.

Technique to include:
- Warming horse up without rider
- Assessment of the horse
- Choice of size of circle
- Handling of equipment
- Stance
- Voice/tone of voice
- Body language/position/influence
- Control

Assessment Criteria 4.5: Assess the rider's strengths and areas for development

The learner will coach a rider of Stage 3 level or equivalent competence. The learner should question the rider to assess their experience and the areas of their riding they would like to develop and then **assess** the rider and horse which may include the following:
- Rider position
- Balance
- Coordination
- Confidence
- Suitability of horse for rider

Assessment Criteria 4.6: Plan the lesson

As a result of the rider assessment in 4.5, the learner should:
- Agree the aims of the lesson with the rider
- Justify suitable exercises and chosen work to develop the rider

> ### ℹ TOP TIP
> This will be a verbal plan, a lesson plan will not need to be seen.

Assessment Criteria 4.7: Use exercises to improve the rider's position

The learner should select exercises that are relevant to the rider and the aims of the lesson (as discussed in 4.5 and 4.6).

Exercises may be chosen to:
- Correct positional faults
- Develop feel and empathy
- Improve balance (may include; work without stirrups/reins)
- Improve lower leg security

Assessment Criteria 4.8: Evaluate the lesson

The learner should be able to **evaluate** the lesson. They should discuss which elements worked well and areas that may not have been as effective, and how these may be developed.
Evaluation to include:
- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 4.9: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the rider, this may include;
- Detail of strengths and weaknesses of rider
- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO5. Be able to coach a group of riders using poles

> ### 🛡️ SKILLS RECORD SIGN OFF REQUIREMENT
> Ready for Assessment.

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

> ### ℹ️ TOP TIP
> Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 5.1: Assess horse and rider strengths and areas for development

The learner will coach a group of 3 or 4 riders of Stage 3 level or equivalent competence. The learner should question the riders to **assess** their experience and areas they would like to develop and then **assess** the riders and horses which may include the following:

- Rider position
- Balance
- Coordination
- Confidence
- Relationship between horse and rider

Assessment Criteria 5.2: Coach to improve horse and rider ability and confidence

The learner will coach using pole work exercises, poles must be placed at suitable distances. The lesson should be adapted as required so exercises are suitable for the group of riders and the areas for development (as discussed in 5.1).
The lesson must include:

- Application of the aids
- Individual correction and development
- Develop balance and effectiveness of the rider
- Relevant exercises to develop horse and rider partnership
- Linking to Training Scale

The lesson may include:

- Positional development
- Transitions
- Adjusting stride length
- School movements
- Work without stirrups
- Adapting plan as necessary

Assessment Criteria 5.3: Evaluate the lesson

The learner should be able to **evaluate** the lesson. They should discuss which elements worked well and areas that may not have been as effective and how these may be developed.
Evaluation to include:

- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 5.4: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the riders, this may include:

- Detail of strengths and weaknesses of riders

- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO6. Be able to coach a group of riders over fences up to 1m (3ft 3ins)

> ### ⬛ SKILLS RECORD SIGN OFF REQUIREMENT
> Ready for Assessment.

✓ This learning outcome is assessed on the assessment day

✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

> ### ⓘ TOP TIP
> Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 6.1: Assess horse and rider strengths and areas for development

The learner will coach a group of 3 or 4 riders of Stage 3 level or equivalent competence. The learner should question the riders to **assess** their experience and areas they would like to develop and then **assess** the riders and horses to include the following:

- Rider's underpinning knowledge
- Rider position and effectiveness
- Feel and harmony between horse and rider over fences
- Balance
- Coordination
- Confidence
- Horse technique and jumping skills

Assessment Criteria 6.2: Coach to improve horse and rider ability and confidence

Based on the assessment in 6.1, the lesson should be geared towards improvement in the riders and horses, whilst building confidence.

The lesson may include;
- Individual correction and development
- Application of the aids
- Relevant exercises to develop horse and rider partnership
- Linking to the Training Scale
- Transitions
- Linking to Training Scale
- Independent and related fences
- Adapting plan as necessary

Assessment Criteria 6.3: Use exercises to improve horse and rider performances

The lesson should be adapted as required so exercises are suitable for the group of riders and the areas for development (as discussed in 6.1). The lesson may include:
- Positional development
- Improvement to the quality of canter
- Developing balance and effectiveness of the rider
- Improvement in the application of the aids
- Adjusting stride length

Assessment Criteria 6.4: Evaluate the lesson

The learner should be able to evaluate the lesson they have taught, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed. **Evaluation** may include:

- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 6.5: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the riders, this may include;

- Detail of strengths and weakness of riders
- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO7. Be able to coach a private show jumping lesson in preparation for a 1.10m (3ft 7ins) competition

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record**

is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.

TOP TIP
Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 7.1: Assess the horse and rider's strengths and areas for development

The learner will coach a rider who is working towards competing at 1.10m competitions.
The learner should question the rider to **assess** their experience and areas they would like to develop and then **assess** the rider and horse which may include the following:

- Rider's underpinning knowledge
- Rider position and effectiveness
- Feel and harmony between horse and rider
- Balance
- Coordination
- Confidence
- Horse technique and jumping skills

Assessment Criteria 7.2: Coach to improve the rider's and horse's ability and confidence

Based on the assessment in 7.1, the lesson should be geared towards improvement in the rider and/or horse, whilst building confidence for both. The learner should use exercises suitable for the rider and horse. Exercises should result in improvement of areas identified in 7.1. Plans should be adapted as required to suit the horse and rider.

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The lesson may include:

- Correction and development
- Application of the aids
- Relevant exercises to develop horse and rider partnership
- Positional development
- Linking to Training Scale
- Developing balance and effectiveness of the rider
- Independent and related fences
- Transitions
- Adapting plan as necessary

Assessment Criteria 7.3: Evaluate the lesson

The learner should be able to **evaluate** the lesson, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed.
Evaluation may include:

- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 7.4: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the rider, this may include:

- Detail of strengths and weaknesses of rider
- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO8. Be able to coach a semi private lesson using grid work or related fences up to 1m (3ft 3ins)

SKILLS RECORD SIGN OFF REQUIREMENT
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

TOP TIP

Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment criteria 8.1: Assess horse and rider strengths and areas for development

The learner will coach two riders of Stage 3 level or equivalent competence. The learner should question the riders to **assess** their experience and areas they would like to develop and then **assess** the riders and horses to include the following:

- Rider under pinning knowledge
- Rider position and effectiveness
- Balance
- Coordination

- Confidence
- Feel and harmony between horse and rider
- Horse technique and jumping skills

Assessment Criteria 8.2: Coach to improve horse and rider ability and confidence

Based on the assessment in 8.1, the lesson should be geared towards improvement in the riders and/or horses whilst building confidence. The learner should use exercises suitable for the riders and horses, exercises should result in improvement of areas identified in 8.1. Plans should be adapted as required to suit the horse and rider.
The lesson may include;

- Individual correction and development
- Application of the aids
- Relevant exercises to develop horse and rider partnerships
- Transitions
- Linking to Training Scale
- Independent and related fences
- Adapting plan as necessary

Assessment Criteria 8.3: Use exercises to improve horse and rider performances

The learner should use exercises suitable for both riders and horses. Exercises should result in improvement. Plans should be adapted as required to suit the horses and riders. The lesson may include:

- Positional development
- Improving quality of canter
- Developing balance and effectiveness of the rider
- Improvement of application of the aids
- Adjusting stride length

Assessment Criteria 8.4: Evaluate the lesson

The learner should be able to **evaluate** the lesson they have taught, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed.
Evaluation may include:

- Reflect on content of lesson
- Logical sequence and timing
- Delivery
- Assessment
- Feedback
- Debate effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 8.5: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the riders, this may include:

- Detail of strengths and weaknesses of riders
- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO9. Be able to coach a private dressage lesson at Elementary level

> **SKILLS RECORD SIGN OFF REQUIREMENT**
> Ready for Assessment.

✓ This learning outcome is assessed on the assessment day
✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below

✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

> ℹ️ **TOP TIP**
>
> Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 9.1:
Assess the horse and rider strengths and areas for development

The learner will coach a rider who is working at Elementary level dressage. The learner should question the rider to **assess** their experience and then **assess** the rider and horse strengths and areas for development to include the following:

- Rider's underpinning knowledge
- Rider position
- Balance
- Coordination
- Confidence
- Relationship between horse and rider

Assessment Criteria 9.2:
Coach to improve horse and rider ability and confidence

Based on the assessment in 9.1, the lesson should be geared towards improvement in the rider and horse, whilst building confidence.

The lesson may include;

- Correction and development
- Positional development
- Develop balance and effectiveness of the rider
- Application of the aids
- Adapting plan as necessary
- Linking to Training Scale

Assessment Criteria 9.3:
Use exercises to improve rider and horse performance

The learner should use exercises suitable for the rider and horse. Exercises should result in improvement of areas identified in 9.1. Plans should be adapted as required to suit the horse and rider.
Exercises may include :

- Simple changes
- Developing medium paces
- Developing turn about/on the forehand
- Rein back
- Shoulder fore/in
- Turn about the haunches/pirouettes in walk
- Direct transitions
- Counter canter

Assessment Criteria 9.4:
Evaluate the lesson

The learner should be able to **evaluate** the lesson they have taught, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed.
Evaluation may include:

- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 9.5: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the rider, this may include;

- Detail of strengths and weakness of rider
- Suggestions for improvement
- Action plan including selection of exercises, time frames, goals

LO10. Be able to coach a semi private arena eventing lesson over fences up to 1.10m (3ft 7ins)

SKILLS RECORD SIGN OFF REQUIREMENT

Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

The learner should coach the riders through progressive exercises to develop their riding of at least one of the following:

- Angled fences set at a related distance
- Corner fences set at a related distance
- Skinny fences set at a related distance
- Fences on a curved line or lines
- Fences set at a related distance requiring different canter approaches (for example, spread to skinny)

From the fences available the learner will select the exercises for their riders. The learner should walk the course before the lesson begins. Then they should tell the assessor what they would like to do and how they will use the fences available. The learner should ensure they arrive to the assessment venue in plenty of time so they can walk the course before their assessment.

ℹ TOP TIP

Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 10.1: Assess horse and rider strengths and areas for development

The learner will coach two riders of Stage 3 level or equivalent competence. The learner should question the riders to **assess** their experience and then **assess** riders and horses strengths and areas for development to include the following:

- Rider underpinning knowledge
- Rider position and effectiveness
- Balance
- Coordination
- Confidence
- Horse technique and jumping skills

Assessment Criteria 10.2: Coach to improve horse and rider ability and confidence

Based on the assessment in 10.1, the lesson should be geared towards improvement in the riders and horses, whilst building confidence.

The lesson may include;

- Individual correction and development
- Application of the aids
- Relevant exercises to develop horse

and rider partnerships
- Transitions
- Linking to Training Scale
- Independent and related fences

Assessment Criteria 10.3: Use exercises to improve horse and rider performances

The learner should use exercises suitable for the riders and horses. Exercises should result in improvement of areas identified in 10.1. Plans should be adapted as required to suit the horses and riders.
Exercises may include:
- Positional development
- Developing the quality of canter
- Developing balance and effectiveness of the rider
- Application of the aids
- Adjusting stride length
- Independent and related fences

Assessment Criteria 10.4: Evaluate the lesson

The learner should be able to **evaluate** the lesson they have taught, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed. **Evaluation** may include:
- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 10.5: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the riders, this may include;
- Detail of strengths and weaknesses of riders

- Make suggestions for improvement
- Share action plan including selection of exercises, time frames, goals

LO11. Be able to coach a semi private dressage lesson at Novice Level

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🛡️ **SKILLS RECORD SIGN OFF REQUIREMENT**
Ready for Assessment.

- ✓ This learning outcome is assessed on the assessment day
- ✓ The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below
- ✓ **Ensure the 'Ready for Assessment' form in the learner's Skills Record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.**

ℹ️ **TOP TIP**

Learners will have 40 minutes to complete this section, this time includes discussion with the assessor.

Assessment Criteria 11.1: Assess horse and rider strengths and areas for development

The learner will coach two riders of Stage 3 level or equivalent competence. The learner should question the riders to **assess** their experience and then **assess** riders' and horses' strengths and areas for development which may include the following:
- Rider's underpinning knowledge

- Rider position
- Balance
- Coordination
- Confidence
- Relationship between horse and rider

Assessment Criteria 11.2: Coach to improve the horses and riders' ability and confidence

Based on the assessment in 11.1, the lesson should be geared towards improvement in the riders and horses, whilst building confidence.

The lesson may include;
- Individual correction and development
- Application of the aids
- Adapting plans as necessary
- Linking to Training Scale

Assessment Criteria 11.3: Use exercises to improve horse and rider performances

The learner should use exercises suitable for the riders and horses. Exercises should result in improvement of areas identified in 11.1. Plans should be adapted as required to suit the horses and riders.

Exercises may include:
- Leg yield
- Transitions
- Adjusting stride length
- School movements
- Trot on a loose rein

Assessment Criteria 11.4: Evaluate the lesson

The learner should be able to **evaluate** the lesson they have taught, they should discuss which elements worked well and areas that may not have been as effective and how these may be developed.

Evaluation may include:
- Reflection on content of lesson
- Logical sequence and timing
- Delivery
- Feedback
- Effectiveness of exercises chosen
- Identify strategies to improve personal performance

Assessment Criteria 11.5: Provide a plan for future development

The learner should discuss with the assessor a plan for the development of the riders, this may include:
- Detail of strengths and weaknesses of riders
- Make suggestions for improvement
- Share action plan including selection of exercises, time frames, goals

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