Assessor Guidance

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The British Horse Society

Assessor Guidance

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All edits are highlighted throughout.

Version Number	Page	Reason for changes made	Date
2.8	5	New mobile number for Julian Campbell	20.01.2025
	10	Assessment terminology update. Competent / Not Yet Competent has been updated to Pass / Fail	
	27	Update to candidate arrival section re: course walk	
	35 and 36	Update to responsibilities of assessors and lead assessors following an assessment	
	49-51	Updates to Stage 3 Ride Jumping criteria and assessor guidance	Live from 01.03.2025

Please note: This document is uncontrolled once printed. Please check with the BHS Education Team for the most up to date version.

Contents

Click on any section below to go directly to the content. To return to the contents page click on the BHS logo (top right) on any page.

Please note specific guidance on the delivery of 'Riding Out' Stage 2 and Stage 3 units and BHSI are detailed in separate documents read in conjunction with this guidance.

Introduction

The BHS is committed to making sure all its activities are conducted safely, fairly, transparently, objectively and free from bias.

The purpose of this document is to detail the responsibilities of BHS Education, assessment centres and assessors when managing and delivering BHS assessments.

If you have any queries about the content of this Guidance, want to offer feedback or suggestions for improvements please contact the Education Team.

Scope and applicability

This guidance applies to:

- Assessments managed by the BHS Education team. This includes qualifications awarded by the BHS and British Horse Society Qualifications (BHSQ). See page 7 and 8 for the full list of qualifications this guidance relates to.

This guidance is for:

- Assessors and Internal Quality Assurers
- BHS employees

Helpful links and documents

This Assessor Guidance should be read in conjunction with the syllabus and guidelines relevant for each assessment. These can be found on the Assessor Hub.

Assessor responsibilities are detailed the in the *Assessor Recruitment and Deployment Policy* and in your *Education Contractor Agreement.* Please refer to these alongside this document.

Assessors have also been issued with a BHSQ document *'BHSQ – Essential guide to assessment of BHSQ qualifications'*; please ensure you refer to this alongside this document. It is also a helpful document to take with you to assessments. If you misplace your copy please let us know and we can issue a replacement.

It is also useful for assessors to be familiar with the *Centre Requirements* the BHS Education Team provide for each assessment. This document also provides guidance for the caller and example course plans for riding units. These can be found on the Assessor Hub.

It is useful to refer to BHS and BHSQ policies and other documents when reading this guidance.
BHS Education policies are on the BHS website. If there is a policy not listed that you would like to discuss, please contact the BHS Education team.

BHS policies: https://www.bhs.org.uk/about-us/how-we-operate/our-policies/
BHS Education and assessment policies: https://www.bhs.org.uk/about-us/how-we-operate/our-policies/education-assessments-policies/
Terms and Conditions for BHS Assessments: https://www.bhs.org.uk/careers-recreational-awards/assessments-information/booking-t-cs/

BHSQ policies: https://www.bhsq.co.uk/policies-and-procedures/policies-and-procedures-documents/

BHS Assessor Hub: https://www.bhs.org.uk/for-our-coaches-and-centres/resources/assessor-documents/
The BHS Assessor Hub is a closed web page. Do not share this link with anyone who is not a current BHS assessor. The Assessor Hub has a variety of documents to support your delivery of assessments. If there is a document or further signposts you would like to see here please let us know.

Further signposting will be within the document where relevant.

Contact details for the BHS Education Team

Education Team: 02476 840508
Email: education@bhs.org.uk
Office hours: Mon-Thurs 8.35am-5pm
Fri 8.35am-3pm
An out of hours office contact will be provided to lead assessors with the assessment paperwork if the assessment is on a non-working day or weekend.

Any member of the BHS Education Team can be emailed by first name.surname@bhs.org.uk
Director of Education: Tracy Casstles | 07876 652007
Head of Education Operations: Michele Carman | 07966 251964

Quality Assurance Team
Quality Assurance Manager: Vicky Connolly
Programme Leader, Workforce: Jenny Wall
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Technical Development Manager: Julian Campbell | 07971 059264
Quality Assurance Coordinator: Ella Steadman

Education Operations Team
Education Operations Team Managers: Tracey Mills, Megen Long
Career Transition Fund Manager: Charis Howard

Education Development Team
Head of Education Development: Laura Hood | 07783 888259
Programme Leaders, Development: Janice Wyatt | Gemma Portman

Terms and definitions

An **Assessor** is contracted to make assessment decisions at BHS assessments.

A **Lead Assessor** is responsible for the management of the assessment they have been assigned to.

An **Assessor Mentor** is an experienced assessor who has been designated as an Assessor Mentor by the BHS to train and support trainee assessors.

Internal Quality Assurer/Assurance refers to the quality assurance process managed by BHS Education. The personal appointed to carry out IQA will be contracted to the BHS.

External Quality Assurer/Assurance refers to the quality assurance process managed by BHSQ. The personal appointed to carry out IQA will be contracted to BHSQ.

Approved assessment centre is any location where a BHS assessment is taking place.

Candidate is anyone taking a BHS assessment.

Trainer is used to describe any professional supporting the candidate to train for BHS/BHSQ qualifications and prepare for their assessment. This could be, but is not limited to, a BHS Accredited Professional Coach or workforce within a BHS Approved Riding School.

Further terms and definitions will be defined within the relevant sections.

BHSQ

BHS Qualifications (BHSQ) is an awarding organisation recognised and regulated by the Office of the Qualifications and Examinations Regulator (Ofqual) in England, SQA Accreditation in Scotland, Qualifications Wales (QW) and the Council for the Curriculum, Examinations and Assessment (CCEA) in Northern Ireland. BHSQ works in partnership with a variety of organisations to develop and award qualifications for the equestrian industry. This ensures BHSQ qualifications are fit for purpose for the sector.

As the awarding organisation, BHSQ is responsible for the processes which learners undertake to obtain certification. BHSQ is responsible for verifying that assessment practice in approved centres is conducted systematically, effectively, securely and to national standards specified within the qualification.

The British Horse Society (BHS) is approved as a centre to deliver qualifications regulated by BHSQ. BHSQ and the BHS developed these qualifications in line with feedback received from extensive industry consultation.

BHSQ's remit of quality assurance covers only the qualifications which are regulated by BHSQ. Stage 1, Ride Leader2, Performance and Fellowship are outside of the scope of BHSQ.

The BHS Stages suite of regulated qualifications awarded by BHSQ:
BHSQ Level 2 Foundation Groom (Stage 2)
BHSQ Level 2 Foundation Groom with Riding (Stage 2)
BHSQ Level 2 Foundation Coaching Riders (Stage 2)
BHSQ Level 2 Foundation Coach in Complete Horsemanship (Stage 2)

BHSQ Level 3 Groom (Stage 3)
BHSQ Level 3 Groom with Riding - Dressage (Stage 3)
BHSQ Level 3 Groom with Riding - Jump (Stage 3)
BHSQ Level 3 Groom with Riding - Complete (Stage 3)
BHSQ Level 3 Coaching Riders (Stage 3)
BHSQ Level 3 Coach – Dressage Ride (Stage 3)
BHSQ Level 3 Coach – Jump Ride (Stage 3)
BHSQ Level 3 Coach in Complete Horsemanship (Stage 3)

BHSQ Level 4 Senior Yard Manager (Stage 4)
BHSQ Level 4 Senior Yard Manager with Riding (Stage 4)
BHSQ Level 4 Senior Coaching Riders (Stage 4)
BHSQ Level 4 Senior Eventing Coach (Stage 4)
BHSQ Level 4 Senior Dressage Coach (Stage 4)
BHSQ Level 4 Senior Show Jumping Coach (Stage 4)

BHSQ website: https://www.bhsq.co.uk/

The BHS Stages suite of non-regulated qualifications awarded by BHS:

BHS Ride Safe (is part of the Challenge Awards)
BHS Stage 1 Care | BHS Stage 1 Ride
BHS Stage 1 Complete Horsemanship

BHS Stage 2 Ride Leader
BHS Stage 3 Trail Leader

BHS Coaching4All

BHSI

BHS Fellowship

Quality Assurance

Quality assurance activities ensure the assessment of the candidate at all stages is valid, authentic, current, reliable and sufficient. It upholds the integrity of the BHS qualification and assessment system. It also ensures the candidate receives a thorough and fair assessment with excellent customer service provided throughout.

Terms and definitions

Internal Quality Assurance is conducted by the BHS and is conducted by an **Internal Quality Assurer (IQA)** who is contracted to the BHS.

External quality assurance is conducted by BHSQ to monitor BHS delivery, ensuring compliance with statutory regulation. External quality assurance is conducted by an **External Quality Assurer (EQA)** who is contracted to BHSQ.

An IQA or EQA may observe and report on some, or all of the following:

Quality assurance – customer service, health, safety and welfare of candidates and horses, safeguarding, facilities, timetabling, presentation of assessors, assessment centre welcome and signage, BHS guidance provided to assessment centres and assessors, BHS information and guidance provided to candidates.

Verification – accuracy of assessment, assessor judgments and decisions, reasonable adjustments and access arrangements, recording of assessment activity, effectiveness of assessment materials, assessment equipment, horses used are at the correct level, management of health, safety and welfare of candidates, including safeguarding, implementation of BHS Education policies, processes and procedures, Skills Record.

An IQA or EQA may also wish to talk to candidates to gather their opinions on their experience.

An IQA or EQA may be allocated remotely or retrospectively. The BHS or BHSQ can, at any time, deploy an IQA or EQA at planned notice, short notice or without notice. The BHS or BHSQ can, at any time, deploy an IQA or EQA to monitor an assessor or assessment centre without notice. This ensures candidate experience is safeguarded at all time.

An IQA or EQA may be at an assessment for a full timetable, or part day depending on the requirements of the sampling. For example if the IQA or EQA role is specific to sample internal verification only, the IQA or EQA may only be at the assessment for a specific time.

If an IQA or EQA is present at an assessment, assessors must cooperate with them and answer any questions they are given. If an IQA or EQA is allocated retrospectively please respond promptly to any request as we hold the results until the activity is complete.

Helpful links

The full BHS Internal Quality Assurance Policy is available on the Assessor Hub.

Diversity, Equity and Inclusion

At the BHS, we value, respect and embrace diversity and equality. This allows us to be inclusive and to engage with as many different groups of people as possible across all our stakeholders.

The British Horse Society has implemented a Diversity, Equity and Inclusion strategy which adheres to our Everyone Welcome Policy. Everyone Welcome means just that. Whatever an individual's ability, background, culture or identity – they are welcome to be part of our equestrian community.

We require all of our BHS Assessors to adopt the Everyone Welcome ethos. We will be all the better for being more diverse, more equitable and more inclusive – as individuals, as a Society and as a sector.

To support you to use inclusive language and to help us on our diversity and inclusion journey, the BHS have created an *'Inclusive Language Guide'* to help you become more confident and intentional in the way you use your language.

Helpful links

Please see our Everyone Welcome web page for more details or email dei@bhs.org.uk
You can find the full *Inclusive Language Guide* and a summary on the Assessor Hub.

Health, Safety and Safeguarding

The BHS has a commitment to the health, safety and welfare for candidates, assessors and all others involved in assessments, as underpinned in the *BHS Health and Safety Policy* and the *Education Contractor Agreement.*

Your priority as an assessor is to look after the health, safety and welfare of yourself, candidates, horses and others during assessment activities, this includes the assessment briefing.

At any point during an assessment should doubt exist as to the health, safety and/or welfare of the candidate, horses, assessor or others, an assessor or assessment centre personnel has the right to stop the candidate at any time.

Consider signposting the candidate to another task or activity if you feel the assessment can continue without compromising health, safety and welfare.

Helpful links

Refer to our Dress Guidance for candidates.

Risk assessments
All assessors are required to be familiar with the BHS Risk Assessment for assessment activities. All assessors are required to risk assess their assessment areas before and during assessment. Hazards should be identified and risk mitigated. Assessors must stop assessment if the health and safety of the candidate, themselves, others or horses is compromised.

A generic, on the day risk assessment is provided to the lead assessor before the assessment. It can also be viewed on the Assessor Hub, in the 'General Guidance' section.

It is the lead assessor's responsibility to ensure a risk assessment is completed, using the risk assessment document as a guide. The lead assessor must also confirm with the assessment centre their health and safety procedures, nominated first aider/s in attendance, fire evacuation procedure and general risk assessments. The lead assessor then completes the 'on the day' risk assessment. The risk assessment document should be updated with any risks not covered in the generic assessment.

The completed risk assessment should be returned via the online 'Lead Assessor report form' within 48 hours following the assessment.

Refer to the checklist on the Risk Assessment document for further information.

Process to follow in response to an accident or near miss

Accident: An unexpected event which results in injury or illness of a person/horse and/or property damage.
Near miss: An unexpected event which does not involve injury or illness to a person or horse.

If an accident or near miss occurs during the assessment:

- Follow the guidance set out in the 'Accidents at BHS Assessment Policy'. Reminder: candidates are not permitted to remount if fallen in a ridden section. They are not permitted to continue with any further ridden sections that day.
- In the event of an accident the assessor will manage the incident and the care, if required of the casualty. The assessor may delegate specific tasks to nominated first aiders. A nominated first aider is someone named on the Risk Assessment document as a first aider. If the assessor needs to leave the candidate following an accident (for example, to return to assessing), the candidate must not be left unattended. The candidate must be cared for/supervised by a trained and nominated first aider.
- For any candidate under 18 involved in a fall, accident or near miss, the candidate's parent/carer must be contacted as soon as practicably possible. If the parent/carer is not on site, the assessor or lead assessor will call the emergency contact details provided using the centre's telephone.
- Lead assessor to ensure the 'Accident and Near Miss report form' is completed and returned via the online 'Lead Assessor Form' within 48 hours of assessment. If you are unsure if the accident needs reporting to RIDDOR, contact us immediately.
- If the assessor can make a decision regarding the assessment outcome (pass or fail) assessor to mark this on the paperwork. If a candidate has fallen in a ridden assessment, if they have ridden for long enough for you to observe competency against all assessment criteria you can mark 'pass' in the assessment observation forms. If not, the assessment result is 'fail'.
- If the candidate does not continue with remaining parts of their assessment, or an assessment decision cannot be made, mark them as 'withdrawn' on the assessment paperwork.
- **Do not allude to any free resits, refunds or transfers** and refer the candidate to contact the Education Team within 15 working days of the assessment. Signpost them to read the *'Accidents at BHS Assessments Policy'* on our website: https://www.bhs.org.uk/about-us/how-we-operate/our-policies/education-assessments-policies/
- An assessor, candidate, centre workforce or any witnesses may be contacted by a member of the Education Team to discuss the circumstances surrounding the accident

Falls/accidents in coaching sessions
Please see the 'Accidents at BHS Assessment Policy' for further information.

Coaching sessions with demonstration riders – this is classed as a training session not an assessment situation (for the rider) so the rider, or the rider's parent if the rider is under 18, can opt to get back on and continue with the session. If the centre has a policy whereby riders are not permitted to remount following any fall then this must be followed.
Accident form is completed and returned via the 'Lead Assessor online report'.

Safeguarding
If you are concerned for a candidate's or your own welfare at any time, contact the BHS Education Team immediately. We will support you with relevant guidance.

The BHS fully accepts its legal and moral obligation under The Childrens Acts (1989) and (2004)* and safeguarding adult legislation* to provide a duty of care to protect all children and adults at risk and safeguard their welfare, irrespective of age, ability or disability, gender reassignment, race, religion or belief, sex or sexual orientation and socio-economic background.
*Nation specific safeguarding legislation and guidance is also adhered to.

As well as BHS specific policies *BHS Safeguarding Children and Young People Policy* and *BHS Safeguarding Adults Policy*, the BHS also fully adopts the British Equestrian Safeguarding Policies: *Safeguarding Policy (Children and Young People)* and *Safeguarding Policy (Adults at Risk)*.

You are required to be familiar with our Safeguarding policies and guidance on our website:
https://www.bhs.org.uk/about-us/how-we-operate/our-policies/safeguarding/

At assessment, robust procedures are implemented:

- Assessments are only held at BHS Approved Riding Schools, or suitable equivalent (for example, Performance Horse Care and Welfare assessments)
- Risk assessments are checked and completed by the lead assessor. The risk assessment reflects specific requirements for children and adults at risk where applicable
- All assessors are current in first aid and safeguarding training
- All assessors have the required Criminal Record check as per the guidelines set by the UK Nation or country of residence they live in
- Candidate to follow the Access Arrangements and Reasonable Adjustment process if they (or a member of their support network) wishes to request any access arrangements for a BHS assessment, or want the BHS assessor/s to be informed of any additional support that may be required on the day
- Candidates are required to 'sign in' and 'sign out' of the assessment centre
- Emergency contact details are collected for candidates. Emergency contact is called if an assessor has concern for the health, wellbeing or safety for a candidate.
- *Accidents at BHS Assessments Policy* followed in the unlikely event of an accident
- Accidents and near misses reported, reviewed and monitored
- Appropriate signage is in place to direct candidates to the welcome room and assessment areas
- Assessors are identified by branded clothing and a name badge

- All assessors, and others such as Internal Quality Assurers, are introduced before the assessment begins and a briefing is given informing candidates of the timetable of the day, what to expect and who to report to should they have a concern, and welcoming any questions from candidates.
- Candidates with access arrangements or reasonable adjustments are acknowledged and spoken to confirming the additional support in place for their assessment
- Online assessments are recorded
- Implementing internal quality assurance which looks at health and safety on IQA visits

In addition to the guidance and procedures set out above, we safeguard candidates under 18 during assessments by:

- Consent* from a parent or carer is given for the assessment booking and assessment information is also sent to the parent or carer at the time of booking confirmation
- The Candidate Emergency Contact Form is sent to the parent or carer before the assessment day. It is the responsibility of the parent or carer to complete this form. Expect to be presented with this on the day.
- Emergency contact details are required for candidates before the assessment day. The emergency contact is called once if a candidate does not turn up
- We recommend that candidates below the age of 18 years of age are accompanied by a responsible adult who remains at the assessment centre for the duration of the assessment
- The lead assessor is made aware who on the assessment is under 18 via 'Safeguarding Report' submitted in the assessment pack

*Parent/guardian consent is not required for students taking an assessment at a college, school or other education provider where they are enrolled. Responsibility will defer to the education provider and the safeguarding measures they have in place for their own students.

Safeguarding under 18s: Responsibilities

Our Terms and Conditions state:

"The BHS must receive parent/carer consent for any assessment booking where the candidate is under 18 years of age on the day of the assessment. The BHS must be provided with a current email and telephone contact for a parent/carer to act as the emergency contact before and on the assessment. The emergency contact provided should be over 18 years old.

"The BHS will email booking confirmation and an Emergency Contact Form to the candidate and to the parent/carer of the candidate. It is the responsibility of the parent/carer to complete the Emergency Contact Form on the day of the assessment, or for the candidate to bring a completed form with them to the assessment. Responsibility for the correct completion of this form, whether before or on the day of the assessment, lies with the parent/carer contact provided at the time of booking.

"The BHS or the assessment centre cannot provide supervision for candidates during breaks and lunch time. The BHS strongly recommends that any candidate below the age of 18 years should be accompanied by a responsible adult who remains at the assessment centre for the duration of the assessment. For candidates aged 16-17, it is at the discretion of their parent/carer.

"The accompanying adult may not observe the assessment. They are required to sign in and sign out the candidate as appropriate during the assessment.

"If the accompanying adult leaves the assessment centre at any time, the responsibility for the candidate remains with the accompanying adult. It is the responsibility of the accompanying adult to leave emergency contact details with the assessor who must be contactable.

"If a candidate under 18 arrives without a responsible adult, the responsibility for the candidate lies with the emergency contact provided at the time of booking. This person must be contactable during the assessment."

If the responsible adult accompanying an under 18 or adult at risk leaves the assessment site or does not accompany the candidate to the centre, the responsibility for that candidate lies with the responsible adult.
If an u18 candidate arrives at an assessment without a responsible adult, the person who has been identified as their emergency contact has responsibility for that candidate. The assessment can still take place.

BHS Approved Centres organising and delivering 'in-house' (devolved) BHS Stage 1 assessments must take responsibility for the safeguarding of children and young people and adults at risk for these assessments.

Safeguarding – lone working
There will be occasions where you may find yourself working/assessing on a one-to-one basis with a candidate. The BHS cannot provide a chaperone for a candidate (unless requested as part of an access to fair assessment request), but if a one-to-one situation arises we recommend you take the following actions:

- Speak to the assessment centre. Will centre employees be working nearby, or can they provide someone to be nearby during the assessment. The centre may not be able to provide this and are not obligated to do so. Let the Safeguarding Officer/Safeguarding Lead on site at the centre know.
- Have a conversation with the candidate and their parent/carer if on site to let them know they will be assessed on a one-to-one basis and what this means (for example, you will assess most of the assessment outside the stable but may enter the stable to check completion of certain tasks). Let them know any arrangements you have made with the centre, for example, if an employee will be nearby.
- If the candidate is not comfortable to continue with part, or all, of the assessment give them the option to rearrange. This may be at their cost. Ask them to contact the Education Team as soon as possible, within five working days after the assessment.
- If you, the assessor, are uncomfortable to continue with the assessment contact the Education Team for advice.
- If the candidate will leave the assessment centre, ensure the sign out procedure is followed.
- Inform the Education Team what happened.

Fire
It is all assessor's responsibility to ensure they are aware of the fire exits and fire evacuation plan of the centre. In the event of a fire, the assessor would lead the candidates, this includes any coaching demonstration riders/participants, they are assessing to the fire meeting points via the allocated exit route. Await further instruction from the centre manager.

Hat and body protector standards
The lead assessor must manage the checking of hats, and when used, body protectors, to ensure they meet the current BSI safety standards. Current safety standards are on the Assessor Hub.

Air jackets should not be worn within groups of riders in an assessment situation. This is due to the increased risk of reaction of horses with other candidates. It is the candidate's responsibility to contact the assessment centre for their consent should they wish to wear an air jacket.
Further guidance regarding dress at the assessments is on our website: https://www.bhs.org.uk/bhs-professional-qualifications-and-careers/assessments/dress-guidance/

Pregnant candidates
A candidate may take any Care, Management or Coaching section/unit of a BHS assessment whilst pregnant, (with the exception of delivering a lunge or lead rein lesson), subject to a specific risk assessment being carried out by the lead assessor.

If a candidate wishes to take either a BHS Riding or Lunge assessment (or the lunge or lead rein lesson of a BHS coaching assessment) whilst pregnant, they may do so on condition that written confirmation that they are fit to undertake the assessment is provided by a doctor/medical professional.

We will inform the lead assessor and assessment centre at the earliest opportunity if we are notified a candidate is pregnant. We will require the lead assessor to carry out a specific risk assessment for the candidate. This is part of your 'on the day' risk assessment but must be documented clearly on the form. You should consult with the candidate during this process so there is mutual understanding of health and safety. Reassure the candidate that if they are concerned they can withdraw or postpone the assessment. If following the discussion and the risk assessment you have further concerns regarding the candidate continuing with the assessment, contact the Education Team before the assessment begins.

Helpful links
Please ensure you are familiar with our full Terms and Conditions for Assessments. These, and all other documents relating to Health, Safety and Safeguarding are all signposted to on the Assessor Hub.

Access arrangements at BHS Assessments

The BHS aims to promote equality, diversity and inclusivity within assessment. Adjustments to assessment may be needed to support candidates to succeed. However, health and safety and the integrity of the qualification must not be compromised.

Terms and definitions

Access arrangements include **reasonable adjustments** and **access to fair assessment.**

Reasonable adjustment are adjustments made to an assessment. They are agreed before an assessment. They allow candidates with specific needs, such as special educational needs, a disability or temporary injury to access the assessment and show what they know and can do without changing the demands of the assessment.

Access to fair assessment is where a candidate does not require any adjustments to assessment because their disability, condition or injury does not require it. However, it may be useful for the assessor or others to understand the situation prior to assessment.

Liaising with assessment centres and lead assessor as part of a reasonable adjustment application

When necessary, we will consult with the assessment centre and/or lead assessor when reviewing a request for a reasonable adjustment.

Consulting with the assessment centres

We may consult with the assessment centre if the centre is involved in implementing adjustments. Examples may include:

- A change to the accessibility or organisation of the assessment room or area
- A specific height of horse or pony
- The use of tack or equipment that needs to be fitted to a horse or pony, or where we need clarification that the horses at the centre would be accustomed to such equipment
- Providing an area for supervised rest breaks or support personnel

We will discuss the nature of the reasonable adjustment and ensure the centre can support the candidate on the day. The centre must inform the BHS Education Team as soon as possible if they have any concerns implementing the reasonable adjustment.

Consulting with the lead assessor

We may consult with the lead assessor if the reasonable adjustment requested would affect the management of the day. Examples may include:

- Breaks to be implemented which affects the timetable of the day
- The management of health and safety

- Requires support personnel to accompany the candidate and remain at the centre

We will discuss the nature of the reasonable adjustment and ensure the assessor/s can support the candidate on the day. The lead assessor must inform the BHS Education Team as soon as possible if they have any concerns implementing the reasonable adjustment.

When BHS Education does not consult with the assessment centre or lead assessor as part of a reasonable adjustment application

Examples when BHS Education does not consult before accepting a reasonable adjustment:

- A candidate requires the assessor to rephrase or apply different questioning techniques
- Physical injuries or disabilities that do not hinder the candidate's ability to achieve the assessment criteria but may need to be taken into consideration during assessment
- The candidate is bringing equipment that does not require fitting to a horse, for example stirrup irons
- The candidate has made an application for access to fair assessment that does not require adjustments to the assessment.

Access to Fair Assessment applications

Access to fair assessment would be applied for if the candidate wants to make the assessor/s and/or assessment centre aware of their disability, injury, condition, or other aspect. However, the candidate does not require any adjustments to assessment. This ensures candidates are supported effectively. Medical evidence is not required for these applications, although may be given.

The assessor will be informed of any access to fair assessment applications in the same way as reasonable adjustment applications.

Sharing information with the assessment centre and lead assessor

Once the application is reviewed and confirmed by BHS Education, we will inform the lead assessor and if necessary, the assessment centre of the access arrangement that has been accepted.

This information will be sent to the Lead Assessor once the application is confirmed. The Lead Assessor has responsibility to inform the assessor who is assessing the candidate.

The BHS will send out a reminder email to the lead assessor within 10 working days of the assessment.

Responsibilities of assessors

- To assess all candidates to the standard as set out in the qualification specification
- To promote an atmosphere where the candidates feel at ease without fear of discrimination
- To manage the implementation of the agreed arrangements with the candidates they assess
- To cooperate with BHS appointed IQAs and BHSQ appointed EQAs upon answering queries related to the management of access arrangements
- To report any instance where the access arrangement has not been applied fairly or managed appropriately on the assessment day.

Responsibilities of lead assessors

Lead assessors have the responsibilities as above, in addition:

- To review any access arrangements they have been informed of by BHS Education
- To liaise with and support the assessment centre if the centre are involved in implementing access arrangements
- To liaise with and support the assessing team regarding the management of any access arrangements
- To oversee the management of access arrangements on the assessment day
- To welcome the candidate upon arrival of their assessment and confidentially discuss the access arrangement they have in place, reassuring them you are aware and how it will be managed
- If the candidate is bringing specialist tack or equipment the lead assessor must inspect the equipment for safety. If there are any concerns about the use of the equipment, contact BHS Education immediately before proceeding
- To advise and support assessors as required

Responsibilities of assessment centres

- To promote an atmosphere where the candidates feel at ease without fear of discrimination
- To provide a point of contact for the assessor to liaise with the centre to discuss access arrangements
- To manage the implementation of the agreed arrangements if requested by the BHS Education Team
- To report any instance where access arrangements have not been applied fairly or managed appropriately on the assessment day
- To cooperate with BHS appointed IQAs and BHSQ appointed EQAs upon answering queries related to the management of access arrangements

On the day requests

The BHS cannot accept requests for reasonable adjustment on the day of the assessment. If a candidate approaches you with a reasonable adjustment request explain the process for applying as detailed in the *Access to Fair Assessment, Special Considerations and Reasonable Adjustment Policy.*

The BHS do not accept Special Consideration requests under any circumstance.

If, by not applying a reasonable adjustment or access arrangement request submitted on the day, this compromises the health and safety of the candidate, horse or others, please contact the BHS Education Team immediately, It may not be possible for the candidate to take their assessment and we will support with this decision.

Helpful links

Access arrangements and reasonable adjustments BHS website page: https://www.bhs.org.uk/bhs-professional-qualifications-and-careers/assessments/access-arrangements-and-reasonable-adjustments

Conflict of interest

Terms and definitions

A **conflict of interest** arises whenever an interest could reasonably be perceived as affecting, or having the capacity to affect, and individual's ability to make impartial decisions on the BHS's behalf. This could be, for example, due to employment, financial, appointments (voluntary or otherwise), professional body membership, investments, partnership, shareholdings and other beneficial interests.

Direct conflicts of interest are relatively easy to identify. The interest (personal, financial or other) relates directly to the duties an individual carries out for the BHS. An example is an assessor making assessment decisions about a candidate they personally know (for example a friend or someone they have trained).

Indirect or perceived conflicts of interest can be more challenging to identify and often more to do with perceptions. An indirect conflict of interest is where the interest (personal, financial or other) applies to someone who has a close personal connection to an individual who carries out duties for the BHS. For example, an individual making a decision that assists an assessment centre where their family member is employed has a conflict of interest, as the possibility of being influenced exists.

Responsibilities of Assessors

Conflicts of interest can arise in a variety of situations and are likely to happen from time to time. Equine is a very close sector where it is likely there will be situations where an interest will be identified.

If an assessor feels under pressure in any way to unfairly advantage or disadvantage candidates, or to pass a candidate, the assessor must report this immediately to the BHS Education Team.

Responsibilities of assessors to identify, report and manage conflicts of interest are detailed in the *Conflict of Interest Policy for BHS Education.*

To summarise, a Register of Interest Declaration must be received from assessors, even if no interests are identified. This is sent and returned with the annual *Education Contractor Agreement.* It is the assessor's responsibility to inform the BHS Education Team of updates/changes to this throughout the year.

At the assessment, if you recognise any candidate as someone you know, you must inform the lead assessor as soon as possible before the assessment begins. The lead assessor will have the responsibility to manage the risk or bias and ensure fair assessment.

To ensure fairness and transparency with regards to horse allocation, assessors should manage the allocation of horses for candidates. Centres would be required to advise in terms of weight limits but should not indicate which horses should be allocated to candidates.

It is the lead assessor's responsibility to complete and sign the 'Conflict of Interest Management' form included within the Risk Assessment document.

Assessors declare if there was a conflict of interest identified with any candidate they assessed. This is reported via the online candidate feedback form.

Helpful links

Conflict of Interest Policy for BHS Education: https://www.bhs.org.uk/about-us/how-we-operate/our-policies/education-policies/

Malpractice and Maladministration

Terms and definitions

Malpractice is any activity or practice which deliberately breaches regulations and requirements. It covers any deliberate action/s that could or may compromise the integrity of the assessment process, the validity of a result or certificate and the reputation and credibility of the BHS/BHS Education. Malpractice will generally involve a person intending to break the rules or cause harm. It is a conscious decision.

Malpractice may include a range of issues such as cheating or facilitating cheating, a failure to maintain appropriate records or systems intentionally and the deliberate falsification of records in order to claim certificates.

Maladministration is any activity or practice which also results in non-compliance with regulations and requirements but is not intentional. This is generally where mistakes are made or poor processes are in place but with no intention of causing harm. It may be a result of inadequate training, incompetence, ineptitude or carelessness and inexperience.

Responsibilities of Assessors

Everyone has a responsibility to be aware of the potential for malpractice and/or maladministration, as there is always a possibility this may occur.

Examples of malpractice and maladministration and responsibility of assessors to identify and report such cases are detailed in the *Malpractice and Maladministration policy for BHS Education.*

As the majority of BHS assessments are of a practical nature, plagiarism, or copying of work, is a low risk. Examples of instances where written/presented work is produced as part of an assessment include; risk assessments and lesson plans within Stage 2 Coaching, or a presentation as part of Performance Business Management and Performance Coaching units.

In these instances if plagiarism or copying is suspected by an assessor, professional discussion and questioning should be used to draw out underpinning knowledge and understanding of the information produced/presented.

For example, within the coaching unit the assessor may also choose to change the brief to the candidate for them to discuss a risk assessment or lesson plan for that brief. It is likely that similar lessons plans and risk assessments would be produced, particularly if the standard BHS template is used. The risk to the assessment process is mitigated by a professional discussion.

If you suspect that malpractice has occurred and there is intentional and deliberate copying of written work/presentations please follow the guidance in the *Malpractice and Maladministration policy for BHS Education.*

Helpful links

Malpractice and Maladministration policy for BHS Education: https://www.bhs.org.uk/about-us/how-we-operate/our-policies/education-policies/

The British Horse Society

Translators

Occasionally, we do receive requests from candidates for a translator for their assessment. This must be formally requested, agreed and arranged by the BHS Education Team before the assessment.

The Lead Assessor will be aware of any translation arrangements agreed via the assessment pack received before the assessment day.

If a candidate requests a translator on the day of the assessment, and one has not been arranged, informal translation arrangements must not be arranged between candidates/observers/trainers/others present.

Best practice guidance for working with a translator

Translator refers to an individual who provides direct translation from the language of assessment to English and from English to the language of assessment.

Before the assessment day (UK and Republic of Ireland):

- Lead assessors should contact translator/s as soon as they receive their assessment pack (three weeks before the assessment) to discuss arrangements.
- The Translator will have been sent a timetable and candidate names they will be expected to translate for.

Before the assessment day (Outside the UK and Republic of Ireland):

- Lead assessors should contact the Centre contact to determine which candidates will require a translator and liaise directly with the Centre regarding the Translators.

At the beginning of the session, assessors should:

- Ensure that the translator completes the Translator Declaration. If the declaration indicates that a translator knows a candidate, the assessor should review the nature of this relationship. If a close personal or financial relationship exists between the translator and the candidate, the assessor should try to manage the day so that that translator does not work with this candidate. If this is not possible, the assessor should seek advice from the BHS Education team.
- At the beginning of the session the lead assessor should ask the translator to introduce themselves to the candidates and clearly explain the role and that the translator is bound by confidentiality and will not discuss the content of the session with anyone.
- Make the translator aware of the appropriate place to stand during the assessments.
- Brief the translator on their aim with the candidates in their section.
- Keep their questions to short bursts to allow for accurate translation. Avoid changing their mind in the middle of a sentence and asking multiple questions at one time.
- Speak directly to the candidate in the first person. Speak more slowly at an even pace and in relatively short segments.
- Maintain good eye contact.
- Pay attention to their own non-verbal communication.

- Be aware that the candidate may relate more closely to the translator than the assessor. This is not unusual as the candidate may feel vulnerable in the environment because they are not able to communicate directly with assessor.
- Be aware that many concepts they express have no linguistic or conceptual equivalent in other languages. The translator may have to paint word pictures of terms they use and this may be longer or shorter than their original speech.
- Be aware that translators are not trained to interpret behaviours.
- Ask that everything they say and that the candidates say is translated.

Translators should be familiar with the Translator Role description (available for you to read on the Assessor Hub).

Riding and Practical Sections

Translators must be briefed and prepared to help step in with authority in order to keep the situation safe and under sufficient control. They should be warned that if a situation becomes unsafe, action may have to be taken quickly without enough time for formalities – it may sound impolite.

Accommodating English speaking candidates at an assessment where there is a translator:

- Every attempt will be made by the Education Team when arranging assessments to either make them exclusively for candidates requiring a translator, or to have a complete group, or groups of candidates using a translator.
- Where mixed groups are necessary, a programme will be created if possible minimizing the group size which include candidates requiring a translator
- Lead Assessors should anticipate groups using a translator may require additional time factored into the programme.
- All reasonable measures must be taken to ensure that no candidate at any assessment where a translator is used is either advantaged or disadvantaged by the process.
- If in any doubt – lead assessors should contact the Office as soon they receive their assessment pack.

After the session:

You may wish to spend a few minutes to "check in" with the translator after the session to clarify aspects of understanding or debrief the translator without the candidate present.
Do not ask translators for their opinion about any aspect relating to the candidate.
Ensure that the translator declaration is submitted via the lead assessor form and the use of a translator is stated whilst submitting the online results.

Helpful links

Watch our video: Best practice guidance for communicating through a translator.

The British Horse Society

Skills Record

A completed Skills Record is a compulsory requirement for Stage 2, Stage 3 and Stage 4 assessments. This includes:

- Ready for Assessment.
- Any Coach Endorsement or Trainer Endorsement sign off that applies to the assessment.
- A completed 'My Details' page (page 3) if photo ID cannot be brought to the assessment.

At Stage 1, the completion of the Ready for Assessment sections are a recommendation.

If the candidate does not have photo ID the complete 'My Details' page is compulsory.

Candidates must present their completed Skills Record book on the assessment day. Failure to do so will result in the candidate not being able to take their assessment. In extenuating circumstances, a candidate may apply for an extension to allow them to have their Skills Record signed after their assessment; this must be applied for before the assessment day. The lead assessor will be notified of any extensions applied for.

Responsibilities of Assessors

All Skills Records should be checked at briefing, before the candidate begins their assessment. If a candidate presents an incomplete Skills Record without confirmation from the office of an extension, you must contact the BHS Education office before continuing with the assessment.

The Assessor must take a note of the person who has signed off the Skills Record and record this on the assessment paperwork. The BHS will sample the Skills Records sign off according to the IQA strategy.

You cannot sign a Skills Record for members of your own family.

Helpful links

Our Skills Record guidance, plus downloadable copies of each Skills Record is available here:
https://www.bhs.org.uk/bhs-professional-qualifications-and-careers/assessments/skills-record/

Before the Assessment

The BHS Education Team allocates the assessing team in advance. We aim to ensure this is done fairly. If we need to cancel any assessor from the assessment we try and give as much notice as possible to allow you time to find alternative work. When the 'assessor sort' is emailed please ensure you respond promptly with dates you can attend and if no dates can be attended, ensure you respond with this.

Timetable

The lead assessor will receive a draft timetable four weeks prior to the assessment. It is the responsibility of the lead assessor to check this, liaise with the centre, make any amendments necessary then return the timetable to the Education Team member from whom they received the draft version. This needs to be done before the assessment is closed three weeks before the assessment and the timetable is sent to the other assessors and candidates are given their start times.

Assessment packs

The lead assessor will receive a paper pack and an email pack. Paper packs are packaged up and sent by post to the lead assessor two weeks prior to the assessment date. The lead assessor must open the pack as soon as they have received it to ensure all paperwork is correct. The lead assessor must contact the fellow assessors and the centre to liaise about the arrival time, running of the day and answer any queries. If, as an assessor, you have not heard from your lead assessor five working days before the assessment day, please contact them directly or the office as soon as possible.

All assessors will receive an email with the timetable and candidate names within two weeks before the assessment. Please note this is for information only and you do not need to print this off.

The **lead assessor paper pack** will include:

1. **Candidate sign in/out sheets** all candidates must sign in on the attendance sheet (one attendance sheet per assessor).

2. **Risk assessment** document. This includes a checklist, the generic risk assessment, and on the day risk assessment, assessor emergency contact details and the conflict of interest management declaration.

3. **Emergency contact forms** informing who should be contacted in case of an emergency, plus any medical information. These should be gathered before the candidates leave the meeting areas and kept confidential. If the candidate is under 18, these have been emailed to the parent/carer before the assessment therefore you should be handed a pre-completed form by the candidate on the day. If this is not the case, the form must be completed by the parent or carer on the day, rather than the candidate.

4. **Hat and body protector guidelines** current hat and body protector safety standards.

5. **Accident and Near Miss report forms** to be completed in the event of an accident or a near miss.

6. **Observation sheets** (relevant to level of assessment). This is your document you can use throughout the day of assessment; we ask you retain these for three months after the assessment. We may ask you to refer to these again within the time period for feedback, complaints and appeals.

7. **Timetables** individual assessor programs and candidate programs will be provided.

8. **Master results sheet** list of all learning outcomes a candidate has been booked into. You will need to identify the pass/fail criterion next to each learning outcome and if relevant, list if their skills record has been signed off and the name of that signatory. This list also includes candidate heights and weights.

9. **Provisional results letter** this might be provided in the pack if a candidate has booked onto multiple assessments within a short period of time. These are to be given out in the sealed envelope after the assessment. Please advise them to open the letter when they get home which will advise them whether or not they have achieved the level to progress onto the next level of assessment.

10. **Bib names/numbers** candidate bib names and numbers, these can be inserted in the bibs provided to the centre. This can be done during the briefing.

11. **Mapping paperwork** if any mapping is required for any candidate this will be included in the pack. Please ensure that this paperwork is returned to the Education Team within 48 hours following the assessment.

12. **Safeguarding document** a report stating who is under the age of 18, if this is blank then no under 18s are present at the assessment day.

All paperwork listing personal information must be confidentially destroyed, if you are unable to do this please send it back to the office.

Within the **lead assessor email** (sent between two and three weeks before the assessment date) you will receive:

1. **Information for lead assessor** stating all assessors present and their contact details.

2. **Feedback sheets** a link to the Assessor Hub is included in the email, feedback sheets can be found on the Hub.

3. **Assessor invoice template** for invoicing after the assessment.

4. **Lead assessor centre feedback form** this can also be found on the Assessor Hub. The lead assessor fills out this form about the centre; this should include positive and development points for the office to be made aware of.

5. **Safeguarding document** a report stating who is under the age of 18, if this is blank then no under 18s are present at the assessment day.

6. **Translator details** if a translator is present for an assessment, the translator details will be included. The lead assessor will need to ensure they touch base with the translator regarding the running of the day.

7. **Candidate list**

8. **Timetables**

The lead assessor may receive an additional email in the run up to the assessment from a member of the Quality Assurance team regarding the following:

1. **Probationary/other paperwork** will be provided if a probationer or observer will be present with the relevant paperwork to be filled out.
2. **Reasonable Adjustments or Access to Fair Assessment**, please ensure you've read this and follow the advice given. It is best practice to let the candidate know you have received their reasonable adjustment and ensure they are fully briefed. Should you have any questions regarding this please contact the office as soon as possible.

Within the **Assessor email** (sent between two and three weeks before the assessment date) you will receive:

1. **Candidate list**

2. **Timetables** individual assessor programs and candidate's programs will be provided. Please liaise with the lead assessor to establish which assessor you are (Assessor A, B, C for example). At this point if you recognise any candidate names on the list you must inform the lead assessor.

If you have not received any email/s as detailed above in the run up to your assessment, you must contact the Education Team. If you have received an email, but you think some information detailed above has not been included, you must contact the Education Team as soon as possible after receipt.

The Assessment Day

Please refer to your *Education Contractor Agreement* and Appendices to the contract for the full responsibilities and expectations of BHS Assessors. A summary is below but this does not reflect the full scope.

Candidates are our customers, and as such should be provided with a good customer experience throughout the day. This expectation of courteous and polite behaviour extends to any demonstration riders and assessment centre staff you may also come into contact with.

Throughout the assessment we ask you to be mindful of centre staff being in the location if they are observing, particularly in the riding sections. This may be wrongly perceived by candidates as centre staff giving an outside influence. If they need to be in the location for any reason we encourage you to keep a distance during the assessment so this perception can be mitigated.

It is important that assessors speak to the Lead Assessor during or after the assessment and report any feedback from the day with them. This will help the Lead Assessor form a full picture of the assessment in order to complete their post-assessment feedback forms.

Assessor arrival and dress

Assessors should dress in a smart and professional manner with a tidy appearance. You should be identifiable as a BHS Assessor. The BHS provide you with an assessor jacket, assessor gilet and assessor name badge. Your name badge must be worn at all times. Assessor jacket/gilet worn weather permitting. Suitable footwear should be clean.

Assessors should arrive with time to prepare and organise for the day before the candidates begin to arrive. This may include:

1. Walking show jumping/cross country course
2. Completing risk assessments
3. Checking tack and equipment
4. Liaising with centre staff/other assessors to organise/confirm timings/layout and management of the day
5. Preparing assessment paperwork
6. Riding to assess the horses (or observing the horses being ridden) for Stage 4 and Performance Ride assessments only

The lead assessor should provide the assessor team with preferred arrival time. This could vary depending on the type of assessment and the assessment centre.

Lead assessor checklist

Go through the 'Health and Safety at BHS Assessments' checklist – on the risk assessment form.

Candidate arrival

Candidates are advised to arrive at least 30 minutes before the start time of their briefing to familiarise themselves with their surroundings. If they are taking a jump assessment, the candidates will have been advised to ensure they walk the course/s before their briefing begins.

As candidates (and parents/carers if a candidate is under 18 or a vulnerable adult) arrive they should be welcomed by the centre or assessor and directed to the briefing room. At this point the centre/assessor should direct them to the facilities at the centre.

Upon arrival, paperwork can be completed such as:

- Emergency contact details
- Sign in sheet

Skills Records, hats and if applicable, body protectors could be checked at this point by the assessor allocated to the candidate/s.

If an under 18 does not turn up to the planned assessment:

- Inform the lead assessor before the assessment begins
- Lead assessor to contact the BHS Education Team before the start time of the assessment
- If the assessment is on a weekend, contact the out of hours duty contact. Details are provided on the safeguarding document.

If you recognise any candidate on the assessment as someone you know you must inform the lead assessor as soon as possible before the assessment begins. The lead assessor will have the responsibility to manage the risk of bias and ensure fair assessment.

Candidate briefing

The lead assessor should carry out a briefing, introducing the team, including IQA/EQA or any observers, probationers there on the day and their remit. The Centre Safeguarding Officer/Safeguarding Lead on site should also be named and introduced. For example,

- My name is xxx, I am the lead assessor for the day and in addition to my assessor role I will also oversee the day
- Your assessors today are xxx. You will be with one assessor for your assessment who will take you through the assessment activities. If you have any queries or concerns at any time today we are here to help support you.
- (Safeguarding Lead) xxx is an employee of this centre and is the Safeguarding Lead on site for the centre today. They are available to speak to should you wish.
- (probationer) xxx is a BHS assessor working alongside xxx today. They may be involved in assessing your assessment activity but this will be explained to you before you start if this is the case.
- (IQA) xxx is here from BHS and they will be looking at the overall picture of the day and the service you are being provided. They are not here to assess you, and may observe some of your assessment. They may want to ask you some questions about your experience with the BHS if there is a suitable break.
- (EQA) xxx is here from our Awarding Organisation BHSQ. They will be looking at the overall picture of the day and the service you are being provided. They are not here to assess you, and may observe some of your assessment. They may also want to ask you some questions about your experience with the BHS if there is a suitable break.
- (Translator) xxx is here in the role of translator today. They will not be involved in assessing you.
- (Someone from the BHS Education Team) xxx is here from the BHS Education Team. They will not be involved in assessing you, but will be looking at the overall picture of the day.

The lead assessor then goes through the format of the day. Candidates should be made aware where meeting points are (for example where they can go during breaks) and that they must sign in/sign out if/when they are leaving the site at any point.

If possible, candidates should be welcomed during the introduction by both the lead assessor and individual assessors in a friendly manner in order to put the candidates at ease. It is the start of the assessment and the assessors' approach will set the tone for the entire assessment. Reassure candidates to enjoy the experience and see the assessment as an opportunity to show off their knowledge and skills.

Each individual assessor should check the candidates they are responsible for have completed the necessary paperwork (emergency contact form, register) and checks such as Skills Record, candidate ID, hat and body protector made if not done upon arrival. Assessors must check candidate's preferred name before handing out the name and number bibs. These can be edited on the day if adjustments are required. If there are any candidates with an Access Arrangement or Reasonable Adjustment request speak to them individually and discreetly to confirm you are aware of their application and what is in place.

Throughout the whole assessment the candidates must be referred to by name, it is important that assessors clearly mark both the name and number on the paperwork, and in discussions always uses the name of each candidate.

Encourage candidates to interact with you and to ask if they are unsure about anything at any point.

Checklist for main briefing upon arrival.

We have advised below which points the lead assessor should cover in their briefing to all candidates. This is only applicable to assessments where there is more than one assessor. One assessor will be assigned the lead role. The lead carries out the briefing to all candidates, and then each assessor will take their group of candidates to carry on with the briefing points indicated below. If the row is not indicated as lead assessor, it should be covered by the assessor allocated to the candidate/s.
For small assessments where only one assessor is present, that assessor will cover all points.

Lead assessor: Introduce assessors, IQA/EQA, probationers, observers and centre safeguarding lead on site	
Lead assessor: Point out facilities for example, toilets and fire procedure	
Lead assessor: Overview of assessment day including falls/accident procedure	
Lead assessor: Make candidates aware of the experience online form sent after the assessment	
Lead assessor: Explain how they will receive their results (guidance below)	
Lead assessor: Signpost to policies (guidance below)	
Check candidates preferred first name	
Sign in all candidates (guidance below)	
Check candidate ID	

Check skills records have been signed off and note APC name and number	
Candidates to fill in emergency contact forms (guidance below)	
Hand candidates their timetable for the day	
Check hats and body protectors	
Distribute names and numbers for bibs	
Ask if they have any questions	
Confirm any access arrangements in place, 1-2-1 with individual candidates as required	

***Sign in register and emergency contact details.**
All candidates MUST 'sign in' using the attendance sheet (one attendance sheet per assessor); if under 18 the candidate should be signed in by a parent/carer (for example, college tutor or centre manager/coach). We recommend in our terms and conditions that candidates under 18 should be accompanied by a parent/carer.

NB: All candidates must 'sign out' when they leave the assessment; if under 18 the candidate should be signed out by the parent/carer.

NB2: The parent/carer should remain on site for the full assessment if the candidate is under 16 (optional if candidate is between 16 and 18 years old or a vulnerable adult). They must not observe the assessment and are asked to stay in the café (if available) or in the meeting room. If the designated carer is the college tutor or centre manager/coach then they can carry on their normal daily routine but should be contactable.

Should a candidate under 18 'go missing' or leave without signing out and the assessor is not 100% confident that they have left safely (with a parent/carer if under 16) then the assessor (or a centre representative on behalf of the assessor) should contact the emergency contact number to check that the candidate is safe. Inform the BHS Education Team immediately.

Receiving results
You must explain that assessment results are not given out on the day of the assessment. Provisional results will be emailed to candidates within **15 working days** after today's assessment. The email address used will be the email given for the candidate's membership record.

We aim to process results so candidates can receive provisional results and feedback via email within 15 working days of the assessment. Within this timeframe, the results undergo a quality assurance checking process. If any concerns are identified which may delay the results being sent then the candidate will be kept informed.

Once provisional results are sent, any certificates due will be posted within 28 days.

Signpost to policies briefing

Below is an example of what to cover when signposting candidates to our policies.

The BHS is committed to making sure all its activities are conducted safely, fairly, transparently, objectively and free from bias. The BHS Education Team, which includes assessors and Approved assessment centres, adheres to a number of polices to ensure a good quality service is provided for you.

Policies in place include:

- *Safeguarding*
- *Health and Safety*
- *Everyone Welcome (Diversity, Equity and Inclusion)*
- *Accidents at BHS Assessments*
- *GDPR*
- *Malpractice and Maladministration*
- *Conflict of Interest*
- *Internal Quality Assurance*
- *Raising concerns*
- *Appeals*

Links to these policies have been included in your communication in the run up to your assessment. If you have any questions about these policies please let me know.

All assessors are current in first aid and safeguarding training. There will also be employees at the centre current in first aid and safeguarding. If at any point today you have any queries or concerns about your health, safety or wellbeing please talk to any of the assessors. Alternatively, the Safeguarding Lead at this centre today is [say name here] please go to the centre reception if you wish to speak to them.

If at any point during your assessment your assessor is concerned for your health or safety, or welfare of the horse you are working with your assessment may be stopped at any time.

Following your assessment you will be emailed a link to a feedback form. Please do look out for this and take the time to give feedback on your experience today. Your feedback is anonymous, or you may leave contact details if you wish for a follow up discussion about your experience.

Briefings specific for each assessment

Below are a selection of generic briefings for each type of assessment: Care, Lunge, Ride and Coach. These should be adapted by the assessor depending on the level of the assessment and the specific expectations/tasks that will be carried out.

Create a situation as realistic and appropriate to the horse (and riders in coaching sessions) as possible.

Care

Your Care assessment today will cover sections such as… We expect you to carry out all tasks safely and with the horse's welfare as your number one priority. If working in a stable your assessor may come in and out of the stable discussing your approach to each task. If at any point you need to stop the practical task to answer the questions of the assessor, then that is absolutely fine but when the assessor finishes the discussion please carry on with the task. If you need a question or instruction repeating or rephrasing please ask.

Ride

You will ride in a group with other candidates. Explain here if a commander will be present (depending on the level) and what will be expected of the rider. For example, Stage 1: You will be riding two horses, but you will be told exactly what is expected of you at all times. During the session you will show some work without stirrups in walk and trot and some work in trot and canter with shortened stirrups in light seat. You will also work over poles in rising trot and in a light seat. We will also be observing your position for balance and security. At the end of the flat section your assessor will ask you some riding theory questions.

If you fall off during a ridden assessment you will not be permitted to remount and continue with any other ridden sections. If you have further non-ridden sections following an accident it is your decision (or your parent/carer's decision if you are under 18) if you wish to continue.

You may be stopped at any time if there is any concern for your own, others or the horses' safety. We must always prioritise the safety of candidates and the welfare and safety of the horses.

You must make the candidates aware if the horses are wearing studs or not.

Lunge

Firstly, check the horse's tack and equipment. You will then lunge the horse for 20-25 minutes and should lunge as if this is the only exercise he will get today. We would like to see you warm the horse up without side reins, then attach the side reins and continue to work the horse. Once you have finished your lunge session I will then ask you some further questions. Reinforce the specification and focus the candidate on the task in hand.

Coaching

Give a briefing relevant to the type of coaching sessions the candidate will be taking part in. Include demonstration riders in your briefing

Assessor notes/observation sheets

Please be mindful that a candidate can request to see copies of their notes from an assessment as part of a Subject Access Request (SAR). For example an SAR may be requested as part of an appeal.

Online (video call) assessments

BHS Education deliver assessments via video call, using the platform Microsoft Teams, for the following units:

Stage 4

- Unit 2: Senior Management

Performance

- Unit 2: Literature Review
- Unit 3: Business Management Skills
- Unit 4: Business Management Presentation

This list is subject to change.

If you wish to assess these your device must have a camera and microphone. You must have sufficient internet access and speed. We recommend you have an up-to-date web browser and have at least 10Mb download and 5Mb upload speed to work well. If lots of people are sharing the Wi-Fi at the same time this will affect the video call quality so consider this if you are in a busy environment. We recommend going to www.speedtest.net and running a quick test to understand how good your connection is.

All assessors that assess video calls will be provided with instructions to join the BHS Microsoft environment. This will enable you to 'manage' the video call yourself so you can admit the candidates to the call.

If you have not used Microsoft Teams before, please notify the Education Team and we can run a test call with you before your first assessment. We can check it runs smoothly and you are familiar with the features such as blurring your background, mute, and record.

It is important to keep yourself, and the learner/candidate safe online. For the units listed above, the candidate will be over 18. You will be notified in the usual way if any reasonable adjustment or other support has been requested from the candidate.

Before you start

One of the key aspects of making this process safe, efficient and smooth for both yourself and the candidate is to plan and prepare what you are going to do.

Make sure you are in an open neutral environment; consider the background. On Microsoft Teams you should be able to choose to blur your background or choose from a selection of neutral backgrounds. Please ensure your surroundings are free from anything of a personal or sensitive nature.

Ensure you are in a quiet room with little background noise or distractions so you can conduct the assessment without disturbance. Smart and professional dress is required. Switch off your mobile phone or set to silent.

Ensure your device is plugged in to an electricity source or fully charged.

The Microsoft Teams meeting call link and candidate information will be emailed to you before the assessment. If you have not received this at least 24 hours before your assessment (or before 12 noon on Friday if your assessment is Monday) then contact the BHS Education Team.

Do not smoke or eat during an assessment.

The assessment

The video calls are set up to record automatically from when you join/start the call. To enable you to be able to start the meeting and admit candidates without the intervention of the Education Team please ensure you adhere to the following process (please note you must have previously joined your account to our Microsoft environment). After you have clicked on the link to join the meeting, please click on the purple button "continue on this browser". The Teams meeting join screen will appear. Scroll down and click the purple "sign in" option. The Microsoft sign in screen will show. Sign in with your Microsoft account that the Microsoft Teams meeting invite has been sent to. Once you have signed in the Teams meeting will launch. Once the meeting starts you can admit the candidate waiting in the lobby. Please ensure you join promptly. If you are having trouble joining the call, or any technical problems, contact the Education Team as soon as possible.

1. Introduce yourself.
2. Inform the candidate the video assessment is set to record, and do they consent to this. "This assessment is recorded for the purposes of quality assurance. The recording will be kept securely for 30 days following the assessment and then will be deleted. Are you happy to continue?"
   If the candidate does not consent to this, politely tell them the assessment cannot go ahead. You will inform the BHS Education Team and someone from the team will be in touch to discuss further options of assessment. End the call.
   You should be able to see if the call is recording as there should be a small red circle visible on the screen and a banner should appear to say recording has started. If this does not appear you may have to select the call to begin recording.
3. Confirm candidate identity. Ask them to hold their photo ID up to the screen.
4. Stage 4 only: Confirm Skills Record sign off. Ask the candidate to hold the Skills Record to the camera and go through the relevant required sign offs. Log the name of the coach on your paperwork.
   If the Skills Record is presented incomplete the candidate cannot take the assessment. This is referred to in their candidate correspondence and on our website. You will inform the BHS Education Team and someone from the team will be in touch to discuss further options of assessment. End the call.
5. As per a standard briefing, remind the candidate "All of the BHS policies specific to assessments are on the BHS Website, which would have been signposted to you in your booking correspondence with the BHS Education Team. Do you have any questions about these policies before we begin?"
   "Your results following this assessment will be sent to you, via email, within 15 working days. You will also have an opportunity to send feedback on your experience today. Any feedback is welcomed in order for the BHS to monitor their service to you."

6. Confirm the unit which you are assessing today. If this involves the candidate delivering a presentation, let them know you will be keeping note of the time and will give a 5 minute warning when they are coming to the end of the time allowed.
7. It is polite to let them know that you will often be making notes throughout their assessment. This means you may not always be looking at the screen but you will be listening. Before you begin, check they are comfortable and if they have a drink if required.
8. Ask the candidate if they have any questions and that they are comfortable, fit and able to proceed with the assessment.
9. Conduct the assessment.
10. Wrap up the assessment. Thank the candidate for their time. Remind them their results will be emailed to them within 15 working days.
11. At the conclusion of the assessment please check the candidate has left the call. If they have not, remove them from the call.
12. Complete your assessor paperwork and submit this to the Education Team within 48 hours.

After the assessment: Submitting results and other 'paperwork' for all assessments

Assessors and Lead Assessors should have a de-brief before leaving the assessment. The Assessor should report any feedback to the Lead Assessor.

Following an assessment we expect assessors and lead assessors to submit their results, feedback and other paperwork promptly to the Education Team within 48 hours following assessment.
All links to online forms are on the Assessor Hub. We advise the use of a spelling and grammar check tool before uploading feedback online – unfortunately these checks are not integrated into our online form.

Refer to the guidance in the *BHSQ – Essential guide to assessment of BHSQ qualifications'*; for advice on structuring feedback. Where observed, highlight any areas of good practice with regards to horse welfare to instil best practice and praise candidates in this area.

Responsibility of Assessors:

- Submit candidate feedback sheet (online form / results) via the online form within 48 hours after the assessment. These will be sent to the candidate, so please ensure you use personal language in ALL sections of the feedback sheets (as in 'you did… but you will need to develop your experience with…'). Your tone should be constructive and supportive and if a candidate has performed exceptionally well in any area, tell them! The *'BHSQ – Essential guide to assessment of BHSQ qualifications'*; has lots of helpful advice surrounding giving meaningful feedback.
- If a translator was used ensure that the translator declaration has been completed and given to the lead assessor form and the use of a translator is stated whilst submitting the online results.
- If applicable, if any mapping has been completed at the assessment for a candidate, this must be submitted 48 hours after the assessment
- Submit your assessor invoice within 30 days following the assessment

Responsibility of lead assessors, in addition to the above:

- Complete the 'Lead Assessor Report Form' 48 hours after the assessment. This form will allow you to:
    - Submit feedback on the assessment centre
    - Submit the risk assessment form (this can be a photo or scanned copy of the paper form)
    - Submit any accident report form or near miss report form (this can be a photo or scanned copy of the paper form)
    - Submit any translator declarations

General notes, guidance and updates

Updated March 2024

Assessor communications

All email communications sent to assessors are also saved on the Assessor Hub. See the 'Assessor Updates' section.

Altering Jumping courses/distances

Please consult with a centre representative before adjusting any jumping courses or distances.

Assessor notes

Please bear in mind that due to GDPR you may be requested to share your handwritten notes with candidates following assessments. Notes should be kept for three months after assessment and then securely destroyed. If we receive a complaint or appeal within this timeframe, we may ask for a copy of your notes.

Results

Results should be submitted within 48 hours of assessment. Results are submitted via an online feedback form – the links for these are in the Assessor Hub.

Recognition of Prior Learning (RPL)

We do offer direct entry routes to BHS Assessments, for candidates that have prior certificated or experiential learning. For details of our RPL routes please see our full guidance on the website: https://www.bhs.org.uk/bhs-professional-qualifications-and-careers/assessments/direct-entry/

Additional assessor guidance for supporting RPL applications is on the Assessor Hub.

Transitioning to the Career Pathways (Mapping)

Candidates often wish to complete BHS qualifications that have been started outside of our current syllabus and specifications. Each application is considered on a case by base basis. To be able to provide accurate guidance as to what 'top ups' or references a candidate may need to complete an 'old world' qualification against the current specification please ask the candidate to get in touch with the Education Team direct.
Mapping guidance is also on our website: https://www.bhs.org.uk/bhs-professional-qualifications-and-careers/completing-your-bhs-qualifications/

If you are asked to provide references for either RPL or mapping applications please contact the BHS Education Team before you provide any references. We can advise on the application, what is required and the evidence we need back in the office. We can provide you with an Assessor Reference Template.

Update to APC Hub

We have updated the APC Hub section titled 'BHS Assessment resources' This includes guidance for APCs when signing off Skills Records and guidance for coaches providing references for learners applying for direct entry to BHS assessments via RPL.

Stage 1

Introduction to Stage 1

Stage 1 is the entry level assessment into the professional career pathway for grooms, professional riders and coaches. It comprises of two awards, Stage 1 Care and Stage 1 Ride and is not on the Regulated Qualifications Framework. It is awarded by the BHS.

To achieve these qualifications candidates must understand the basic principles of horse care and, working under supervision, be able to undertake daily routine tasks involving horses in the stable and at grass safely and efficiently. This will provide a sound foundation of knowledge and skills to help candidates progress into employment and future learning and development.

In all sections, the management of the horse is of paramount importance. Candidates must be aware of the horse's behaviour and character and handling must be safe and efficient at this level. They will ride schooled horses in an enclosed environment with a balanced and sympathetic manner, offering a firm foundation in basic riding skills.

Stage 1 will find candidates working safely under supervision on a stable yard with empathy towards both horses and colleagues alongside the practical skills and knowledge to ride in a group within a school environment.

Co-Assessment Requirements

Candidates are required to gain their Ride Safe Award (now known as the Ride Safe silver Challenge Award) before they will be certificated for Stage 1 Ride. This is a co-requisite and although candidates are encouraged to achieve their Ride Safe before their Stage 1 Ride Award, it can be completed after the Stage 1 assessment.

Unit 1: Stage 1 Care

The assessors' primary consideration is that the candidate can work SAFELY and with consideration of the horse's WELFARE. There is no 'set' way to do any practical task as long as it is carried out with this in mind.

Candidates show an efficient use of time as required by industry. Candidates will show they have the required knowledge by practical demonstration and discussion. They will be in groups of up to three candidates with one assessor throughout the whole assessment process although they will be working as individuals through the day.

Care A- approx. 1 hour 15 minutes
This section will cover the following topics:

- Responsibilities on an equestrian yard
- Mucking out
- Grooming tasks
- Horse health
- Rugs
- Behaviour

Suggested briefing/order:
Candidates should be briefed to undertake a full muck out. The emphasis should be on seeing the candidate work in an effective and timely manner.

Learning Outcome 1 can be covered during this the period. Candidates should have a basic understanding of the topics and should be able to answer each question. Questions should be asked individually to each candidate as they complete mucking out but these questions must be open in format.

CARE B approx. 40 minutes
This section will cover the following topics:

- Tack
- Handling
- Feeding
- Watering

Please refer to the centre guidance for the requirements.

Suggested briefing/order:
All candidates may tack up at the same time so the assessor can observe. Allow the candidate to tack up without disturbance. Once tacked up, each candidate can be asked questions in relation to the tack for example - safety checks. When asked to untack candidates can leave the bridle on ready for trotting up.

When trotting up during section B, it is up to the discretion of the assessor as to whether all three candidates lead out at the same time to the trot up area, or whether candidates are taken separately. If candidates are left on the yard whilst one is trotting up, the assessor should ask the second assessor in the area to supervise the remaining two candidates. Candidates being assessed for care only must trot up during the care section as will not be present for the riding.

When assessing candidates cleaning a bridle, emphasis should be on the candidate's ability to put the bridle together – if time is limited the candidate is not required to clean the full bridle but can discuss the process.

Unit 2: Stage 1 Ride
Candidates will normally ride two horses in the flat work section. This will be in a group of up to six riders in an enclosed space.

Candidates should be seen to work in harmony with the horse, showing respect and consideration for the horse and other riders. The aids must be clearly given with the rider able to maintain their position.

The riding includes work on the flat in walk, trot and canter independently, and as a ride. They will also ride over poles in walk and trot. Within the remit of the exercises, the balance of the horse and the horse's way of going must be unhindered when riding without stirrups, when riding in a light seat and working in rising trot over poles.

Candidates who are below the standard can be asked to retire if they are deemed unsafe.

Candidates will ride in a group of up to six candidates in a session lasting one hour. They will usually ride two horses showing work with and without stirrups. The work without stirrups will be in walk and trot. Work with stirrups will be in walk, trot and canter and include work over both a single and a line of trotting poles. Light seat should be shown in trot and canter on both reins. Candidates may carry a stick of up to 75cm.

A caller will be in the school to call out the exercises to be ridden and to offer assistance to the ride where necessary. Caller guidance can be found within the *Centre Guidance* .

Stage 2

Introduction to Stage 2

Stage 2 will find candidates working under regular supervision and it comprises of four units; Stage 2 Care, Stage 2 Ride, Stage 2 Lunge and Stage 2 Coaching. Candidates will be able to carry out tasks involved with the care of stabled and grass kept horses. It is aimed at individuals who already possess basic skills and knowledge and who wish to enter into, or progress within, employment or develop their skills and knowledge in order to sit higher level qualifications.

They will be fully aware of the importance of health and safety in connection with the work they carry out and will be able to recognise hazards and assess risk.

The assessor's primary consideration is that the candidates can work SAFELY and with consideration of the horse's WELFARE. There is no 'set' way to do any practical task as long as it is carried out with this in mind.

Candidates must be aware of the horse's behaviour and character, and handling must be safe and efficient at this level. Candidates must be physically fit in order to carry out yard work competently without undue stress and strain and show an efficient use of time.

Unit 1: Stage 2 Care

Skills Record

Assessors must check each candidate's Skills Record. In addition to the 'Ready for Assessment', the following sections listed are prerequisites and should be signed off as a coach endorsement prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

- Load and unload a horse under supervision
    - I can carry out safety checks for horse transportation
    - I can load and unload a horse from a vehicle
- Bath a horse
    - I can bath a horse
    - I can dry the horse off

CARE A:

This section will cover the following topics:

- Fitting tack and boots
- Preparing for travel
- Plaiting and trimming
- Foot care
- Stabling and turn out

CARE B:
This section will cover the following topics:

- Roles and responsibilities of an assistant groom
- Horse behaviour
- Feeding
- Horse anatomy
- Fitness
- Health

LO3: Be able to prepare a horse to travel
Assessment criteria 3.2 (Handle a horse safely in preparation for loading) the skill being assessed here is the **safe handling** of the horse in preparation for loading. The horse/s are not required to be loaded into a lorry or trailer. The candidate/s must lead a horse (in travel equipment) out from the stable and to a suitable area on the yard, this can be within a group (for time saving purposes) or individually, and then return to the stable. The horse/s are not required to be in a bridle, however you may choose to do this based on your risk assessment.
You should further question the candidate on their understanding of safe handling in different loading scenarios if elements within the assessment guidance are not observed.

As this is handling skills in the scenario of loading, the horse must wear travel equipment (the horse does not have to wear hind travel boots if the centre advises the horse doesn't usually wear these). The horse must not be wearing a saddle.
The centre does not have to provide a vehicle for loading.
The skills of safety checks, loading of horse are covered in the Skills Record and do not need to be repeated.

Unit 2: Stage 2 Lunge
The aim of this unit is to provide the learner with the skills and knowledge to lunge a horse under supervision. The learner will need to be fully aware of the importance of health and safety in connection with this work and will need to be able to recognise hazards whilst lungeing and assess risks.

Candidates must demonstrate an ability to exercise a quiet horse on the lunge safely. They must show safe and practical handling of the equipment and the horse. The lungeing must be carried out competently with the horse or pony on a suitable sized circle. Candidates are required to show walk, trot and canter (canter if appropriate) and use side reins for part of their work.

Skills Record
Assessors must check each candidate's Skills Record. In addition to the 'Ready for Assessment', the following sections listed are prerequisites for this unit and should be signed off as a coach endorsement prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

- Put on and take off appropriate equipment needed to lunge a horse

- I can select and put on appropriate lunge equipment
- I can remove lunge equipment safely

Unit 3: Stage 2 Ride

This is a unit where candidates will be able to ride horses on the flat and over fences in an enclosed area under limited supervision. Candidates are required to demonstrate their ability to ride without assistance. Candidates will normally ride two horses on the flat and two horses over fences. Candidates will be required to show that they can maintain a secure, balanced position in harmony with their horses. Their position must be established, and they need to show empathy with all the horses they ride. They must be confident and competent riding horses without stirrups in all three paces. When jumping, they must again show confidence and an acceptable level of competence.

If a candidate has been unsuccessful in the flat section (Ride A) they will NOT be permitted to continue to the jump section (Ride B). Candidates may be asked to withdraw from the jumping unit at any time during the session if they are deemed to be unsafe.
Candidates who are below the standard may be asked to retire at any point.

Skills Record

Assessors must check each candidate's Skills Record. In addition to the 'Ready for Assessment' the following sections listed are prerequisites for this unit and should be signed off as a coach endorsement prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

- Ride in an open space
  - I can ride in a balanced position in walk, trot and canter
  - I can ride independently within a group

Ride A – Flat. Approx. 45 minutes

Candidates will ride in a group of up to six candidates. They will usually ride two horses and will work without stirrups in walk, trot and canter. Candidates will work through a series of exercises including school figures and will be able to ride independently in open order. Candidates will show some work riding with their reins in one hand. Candidates should carry a schooling whip on a least one of the horses.
A caller (from the centre) will be in the school to call the exercises to be ridden.

Ride B – Jump- Approx one hour

Assessors must assess the candidate for safety whilst they are warming up for jumping (if not seen them ride on the flat).

Candidates will ride in a group of up to six candidates. They will usually ride two horses. A grid or gridwork is not required for Stage 2 Jumping. Riding in an open space is assessed through the Skills Record as a Coach Endorsement and so does not need to be included in the assessment day.

Unit 4: Stage 2 Coaching

The Stage 2 coaching unit is aimed at the individual who already possess basic skills and knowledge who would like to develop their skills into coaching others. Candidates must show that they have the required qualities and can apply the basic principles of teaching/coaching, for example manner, voice, control and positive body language.

Candidates will be required to give a class lesson which incorporates both flatwork and jumping, a lunge and a lead-rein lesson and deliver a practical stable management lesson (refer to syllabus for lessons).

Skills Record

Assessors must check each candidate's Skills Record. For this unit the 'Ready for Assessment' is listed as a prerequisite for this unit and should be signed off prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

Learning Outcome 1 is often best assessed at the start of the candidate's assessment but may also be assessed during the 10 minute discussion at the end of the assessment. If time is limited it may be assessed at any point throughout the day.

Learning Outcome 2 can be assessed during any of the discussions following the coaching sessions. Where possible questions should be related to the lesson taught, for example, after the lead rein lesson the candidate may be asked how they would adjust the lesson according to whether they are teaching a child or an adult.

Learning Outcomes 3 and 4 relates to all coaching sessions the candidates delivers.

Learning Outcome 5. Be able to coach a lead rein lesson

Time allowed: 20 minutes + five minute discussion. (Note: a lunge lesson may be happening at the same time). Candidates will be required to teach a lead rein lesson with a beginner rider (adult or child). The lead rein lesson will last approximately 20 minutes. This may be slightly less than the time allocated in a commercial environment so the candidate must be able to move the lesson forwards in order to showcase their skills. After the session the candidate will have a discussion with their assessor to cover the theory elements of the learning outcome.

Learning Outcome 6. Be able to coach a lunge lesson

Time allowed: 30 minutes + five minute discussion.

Candidates will be required to teach a lunge lesson to a novice rider who should be able to walk, trot and canter (although they may not be asked to show canter in the lesson). The candidate will have 30 minutes for this session, which includes warming up and assessing the horse prior to mounting the rider. Candidates should focus on improving the rider's position and balance. After the session the candidate will have a discussion with their assessor to cover the theory elements of the learning outcome.

Learning Outcome 7. Be able to coach an integrated flatwork and jumping group lesson
Time allowed: 45 minutes + five minute discussion.
Candidates will be required to teach an integrated flat and jumping lesson to a group of riders (minimum 3 riders), who are able to jump small related fences of up to 75cm. The lesson should contain a common theme that runs through both elements. Assessors should check the lesson plan provided by the candidate and ensure that the candidate intends to teach both flatwork and jumping, if the assessor identifies from the plan that insufficient flatwork or jumping will be shown they should discuss this with the candidate so their plan can be adjusted.
In order to pass the learning outcome the candidate must show flatwork and jumping. The jumping element should include grid work or related fences, for example a double or related distance.
Candidates will be given 45 minutes to deliver this session, this may be slightly less than the time allocated in a commercial environment so the candidate must be able to move the lesson forwards in order to showcase their skills. After the session the candidate will have a discussion with their assessor to cover the theory elements of the learning outcome.
Learning Outcome 8. Be able to coach a practical stable management lesson
Time allowed: 15 minutes + 10 minute discussion.
Candidates will be required to teach a practical stable management session to one participant which is usually another candidate. They should have prepared lesson plans for the four topics listed in the assessment criteria. On the day the assessor should select one for them to deliver
Candidates will be given 15 minutes to deliver the session, this should include;

- An introduction to the topic
- A practical demonstration
- Opportunity for the participant to practice the task with support from the candidate
- A conclusion

The time allocated may be slightly less than in a commercial environment so the candidate must be able to move the lesson forwards in order to showcase their skills. After the session the candidate will have a discussion with the assessor to cover the theory elements of the learning outcome.
Learning Outcome 9. Be able to plan for professional development is best assessed during the final discussion of the day. Candidates should reflect on each session and be able to consider how they could develop their performance.

Stage 3

Introduction to Stage 3

Stage 3 is a qualification where a candidate must show the ability to look after a number of horses and offers a benchmark for the equine industry's accepted protocols in caring for stabled and grass kept horses. This qualification is aimed at individuals who already possess skills, knowledge and understanding at a basic level who wish to progress within employment or further their skills and knowledge in order to sit higher level qualifications.

Candidates who hold this qualification will be able to manage their work safely and efficiently, applying skills and knowledge relating to the care and management of horses through a range of tasks under minimal supervision. They will be able to select and use relevant equipment and manage their use of time according to industry practice. They will exhibit competence and autonomy to the level required by industry to enable them to enter into a more senior post.

In all sections handling of the horses is important. Candidates must be aware of the horses' behaviour and character and handling must be safe and efficient at this level.

The assessors' primary consideration is that the candidates can work SAFELY and with consideration of the horse's WELFARE. There is no 'set' way to do any practical task as long as it is carried out with this in mind.

Unit 1: Stage 3 Care

Skills Record

Assessors must check each candidate's Skills Record. In addition to the 'Ready for Assessment' the following section is listed as a prerequisite for this unit and should be signed off as a coach endorsement prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

- Clip a horse
  - I can give reasons for clipping horses
  - I can explain the considerations for safe clipping
  - I can clip a horse
  - I can describe how to care for a horse after clipping

CARE A:

This section will cover the following topics:

- Tack (including bits and studs)
- Conformation

<u>Tack (including bits and studs)</u>

Whilst the assessor discusses studs and bits, they should be positioned so they can see the other candidates tacking up. The assessor must watch each candidate putting on the double bridle, so may brief the candidates when tacking up for flatwork to put on the saddle and bandages first, and then watch the candidate put the double bridle on as part of their discussion of the flatwork tack.

Flatwork tack to include; double bridle, saddle suitable for flatwork, polo wraps (minimum of diagonal pair, time permitting can be asked to put a set of four on).

Jumping tack – the candidate should be asked to tack up for either show jumping or cross country. For show jumping, tack should include; bridle with breastplate and martingale attachment, suitable saddle, and boots suitable for jumping (for example, tendon and fetlock boots or a suitable alternative). For cross country, tack should include; bridle with breastplate and martingale, suitable saddle, boots suitable for cross country (for example, cross country boots or a suitable alternative).

Trot up and assessment of conformation

The same horse is to be used for all candidates in a group. Candidates will trot up for each other in rotation. The assessor will hold the horse for the static conformation assessment. Candidates will need to be positioned where they cannot overhear each other.

CARE B:

This section will cover the following topics:

- Roles and responsibilities of a groom
- Behaviour and handling horses
- Health
- Anatomy
- Types of shoes
- Managing a turn out area
- Fitness
- Nutrition

These notes provide suggestions as to how assessors may run sections. However, assessors may run the content of each section in any order and assessments should be adapted to cater to the specific location and individual candidates on the day.

Whilst covering anatomy, health and behaviour with candidate one, the assessor will need to ensure they are positioned where they can see the candidate taking TPR and the candidate holding the horse.
The candidate holding the horse will then go for a break.

After taking TPR the candidate can carry out the assessment of the field ready for discussion and can look at the selection of shoes, if time allows.

When covering anatomy, the assessor should link this to health questions, for example, ailments of the lower leg in relation to anatomy of the lower leg (for example, tendon injuries, splints).

The individual discussions on nutrition and fitness could be in relation to the horse the candidate tacked up or a separate scenario could be used.

Unit 2: Stage 3 Lunge

Candidates will be able to safely, competently and confidently lunge a fit horse for exercise to maintain the horse's level of training. They will handle the equipment efficiently and be able to adapt their technique to the temperament of the horse. They will be able to utilise relevant exercises to ensure the horse is well exercised The horse/pony must be on a suitable size circle and must go freely forward.

Questions may be asked about the value of lungeing and on the fitting, safety and benefits of the equipment used, where and how long to lunge. They will also be asked to explain the importance of rhythm and balance when lungeing. Candidates will be asked to evaluate how the horse responded to the lunge session.

Candidates will have approximately 20 mins to lunge.

Skills Record

Assessors must check each candidate's Skills Record. For this unit the 'Ready for Assessment' is listed as a prerequisite for this unit and should be signed off prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

Unit 3: Stage 3 Ride Dressage

Candidates are required to ride horses to maintain the horse's level of training. The assessor should see evidence of the candidate riding an appropriate warm up plan and making an assessment of the horse's way of going. From this assessment the candidates should use exercises to develop the way of going from the level seen in the warm up to the horse's current level of training. Candidates are not expected to improve the way of going beyond the horse's established level of training.

The rider should work in harmony with the horse, showing respect and consideration. Candidates should ride the horses forward into a receiving hand, to allow the horse to work correctly. Apply correct influences and smooth application of the aids with a clear understanding of the reasons for them. They should ride the horses forward in good form through transitions, turns on/about the forehand, leg- yielding, and if appropriate, show lengthening and shortening of strides at all gaits. There should be sufficient preparation for each movement to allow the horse to perform smoothly. The school figures chosen will be suitable for the horse they are riding, allowing that horse to maintain their balance and way of going.

Candidates will talk about how the horses went, following the basic principles of training, which should show an understanding of the Training Scale. Discussion prompts for assessors are in the syllabus. This discussion will be one to one with the assessor.

Candidates must not be asked about improving the horse's way of going, at Stage 3 level they are maintaining the horse's level of work.

Throughout the session Assessors will be looking for a correct way of going in the horse's work. Assessors should be aware that horses are individuals, and some will be easier than others. Each horse rider combination will be assessed individually, and the riders must be seen to work the horse in a good form.

Candidates must be able to ride in open order, abiding by the rules of the school whilst showing consideration for other riders. Candidates must ride effectively yet sympathetically, while maintaining a balanced, and independent seat at all gaits, both with and without stirrups.

There is no caller present at a Stage 3 Ride assessment, so the assessor is responsible for briefing the candidates and managing the session. A representative from the centre should always be present to assist if needed.

SUGGESTED BRIEF AND RIDING PLAN FOR STAGE 3 FLAT WORK
First horse
Work to establish good rhythm and balance in all three gaits.
At some stage quit and cross your stirrups, retake after a few minutes and continue.

Second horse
After gaining a brief feel of your horse's way of going, work to improve the quality of your horse's transitions to and from the canter. Use lengthened stride where appropriate.

After gaining a brief feel of your horse's way of going, assess the horse through turns on the forehand, turns about the forehand and leg yielding, and then work to improve.

Riders to work both horses individually (depending on the size of the school, candidates may be told when to change the rein or allowed to work on either rein as they wish). All rules related to working individually must be clarified at the beginning of the session. Approximately 20 minutes per horse followed by a brief discussion with the Assessor about the horse and the horse's way of going.

Skills Record
Assessors must check each candidate's Skills Record. For this unit the 'Ready for Assessment' is listed as a prerequisite for this unit and should be signed off prior to the assessment day. Please ensure you mark this down on the candidate's results sheet with the coach's name and Accredited Professional membership number. If a candidate does not supply a signed Skills Record, please call the Education Team.

Unit 4: Stage 3 Ride Jump
A representative from the centre should always be present during the riding. The cross-country course needs to be easily visible. It is sensible to position a competent person at the furthest point of the course to help if a rider gets into difficulty.

Stage 3 Ride Jump is a separate unit to Stage 3 Ride Dressage, thus, candidates are not required to achieve Stage 3 Ride Dressage before taking Stage 3 Ride Jump.

Candidates should have been directed toward walking both the show jumping and cross-country courses before their first welcome briefing.

Jump only candidates: Assessors must assess the candidate for safety whilst they are warming up for jumping (if not seen them ride in the dressage unit).

Candidates may be asked to withdraw from the jumping unit at any time during the session. If the assessor has seen a candidate in the Stage 3 Ride Dressage and has assessed that they are unsafe to continue to the jumping, the candidate is not permitted to continue to the jumping and must be withdrawn. The candidate must only be asked to retire for safety reasons not for technical ability. Candidates who have been assessed in the Ride Dressage assessment as not being competent technically and are marked as 'fail' but are considered to be safe to continue to the jump assessment, may be allowed to do so at the discretion of the assessor. Only those candidates who, in the opinion of the assessors on the day, are considered safe to jump with regard to their effective control of the horse and their own balance and security in the saddle, will be invited to progress to the cross-country section of the assessment.

Candidates will be able to prepare for and ride a horse over a course of show jumps up to 90cm and a cross-country course up to 80cm. Riding forward, with a secure, balanced and independent position, taking the welfare of the horse into consideration.

It is paramount that the rider works in a balanced position that does not hinder the horse, impede the horse's balance or have a detrimental effect on their way of going. The rider should work in harmony with the horse, showing respect and consideration for the horse and other riders.

Candidates will have walked the show jumping course and the cross-country course so they can ride a flowing track at a suitable speed, have considered the going and whether they are riding/jumping up or down hill. Candidates should be questioned regarding their strategy for riding a course of fences during the assessment.

Candidates will show a suitable warm up routine, taking into consideration other riders. They will ride effectively yet sympathetically, ensuring the horse works in rhythm and balance, and makes correct approaches to the fences. They will maintain a balanced, and independent position at all gaits. The rider must ride with pace suitable for the weather and ground conditions.

Candidates will be able to evaluate their show jumping and cross-country experience. They should consider how the horses worked and how they jumped in relation to the way in which the course walked. In addition, candidates will be expected to be evaluative of their own performance and recognise the challenges they had. Candidates should be able to discuss training in a manner that shows understanding of how to maintain a level of training.

When discussing jumping they should be able to explain how to introduce a horse to jumping and how to progress jumping using poles, grid work, gymnastic exercises, related distances and cross country fences (Learning Outcome 1).
It is important that candidates show an understanding for their work and can relate practically.

Candidate briefing example

Briefing to candidates should indicate they are NOT riding their horse from a competitive perspective but in a manner to maintain the level of training and to promote confidence and way of going in the horses they will ride. For example, the brief may state, you are riding a horse used in a riding school teaching other riders. You are riding your horse in a manner that will maintain the level of training and provide confidence through a good experience. Take time between fences to ensure balance and pace is maintained. You can circle in order to present the horse to the fence appropriately.
NB: Most centres will not put studs in for cross country, so if this is the case, candidates should be briefed as such.

Unit 5: Stage 3 Coaching

The stage 3 Coaching unit is aimed at the individual who would like to become a coach, freelance or employed. Candidates are required to demonstrate the skills and knowledge to coach a "Novice" level rider for dressage in a private dressage lesson and two riders over simulated cross-country jumps (up to 80cm). The candidate will be able to plan, deliver and evaluate the coaching session. Working unsupervised, the candidate will create a positive and safe environment in which learning can take place.

Learning Outcome 1 is often best assessed at the start of the candidate's assessment but may also be assessed during the 10 minute discussion at the end of the assessment. If time is limited it may be assessed at any point throughout the day.
Learning Outcomes 2 and 3 relates to all coaching sessions the candidates delivers.
Learning Outcome 4 Be able to coach a flatwork Lesson
Time allowed: 30 mins teaching + 20 mins discussion
Type of lesson: private dressage lesson
Candidates are required to teach a dressage lesson to demonstrate their abilities to progress a rider beyond the basics of walk, trot and canter, and basic school exercises. The candidate should demonstrate that they are able to begin to apply the Training Scale to develop rhythm, suppleness, contact, impulsion and straightness in the horse and develop the rider's understanding and recognition of these concepts. They should be able to use exercises such as school figures and transitions to help to improve the horse's way of going and are able to teach the fundamentals of leg yield, turn on or about the forehand and lengthened strides in trot and/or canter. The candidate should show progression throughout the session and actively encourage feedback from the rider. The candidate should be able to give constructive feedback and suggest work going forward. The pupil could be a rider on their own horse, a member of staff riding a livery horse they are going to compete or a recently passed Stage 2 candidate who now wants to develop their skills towards Stage 3 dressage ride.

The candidate should, ideally, produce a generic lesson plan that can be easily adapted for the needs of the pupil following their initial assessment. The assessor should discuss the plan with the candidate. The rider should be helped with the effectiveness of their aids and position in order to improve their effect on the horse's way of going.

The selection of exercises and explanations as to HOW to ride them, along with the reasoning behind their use should be part of the assessment. The session needs to be interactive, interesting but always with the basic way of going as the priority. The rider's knowledge and feel should be developed to enable them to take responsibility for their performance. In discussion, training any of these movements along with an appreciation of the Training Scale could be included.

The assessor will discuss the lesson with the candidate; strengths, areas of improvement and anything that could be done differently. At the same time technical questions related to rider progression can be asked. The riders can be asked to provide feedback on the value of the session.

LO5. Be able to coach a simulated cross-country jumping lesson
Time allowed: 40 mins teaching + 10 mins discussion

Type of lesson: semi private arena eventing lesson

Candidates are required to demonstrate that they can introduce riders to the concept of riding cross country using simulated cross country fences in an arena, up to a height of 80cms, suitable for riders to develop their understanding of how to jump XC fences that require more skill than jumping a log; for example; pace, straightness, focus and position. The two riders should be of Stage 2 level working towards Stage 3 level. Riders must be confident jumping 80cm.

The assessors need to check the fences before the assessment starts as fences may need some position adjustments when a 20m wide arena is used if approaches are too difficult. Consult with the centre coordinator being adjusting or moving fences.

The candidates should be encouraged to select some, but not necessarily all, the fences to coach over. The candidate should be advised to verbally assess their pupils and set them up to work in. During this period the candidate will discuss the possible use of the fences with the assessor before they start coaching.

The session should cover the riders' cross-country position and security. The candidate should demonstrate sufficient technical information to enable the riders to develop their knowledge of HOW to ride the different fences, especially maintaining straightness and looking ahead.

The session needs to be interactive to enable the pupils to take responsibility for their learning and performance.

It is a good idea to walk around the fences and asked the candidate how they think they might use the fences giving the opportunity to assess their underpinning knowledge of approaches and rider security. The candidate should demonstrate that they have the ability to teach riders the concept of adapting the canter pace, riding in a forward canter, riding in a light seat, how to jump fences such as corners / brush / arrowheads / water trays / skinnies. This should include lines of approach and jumping angled fences in a progressive way. The candidate is responsible for making sure the safe positioning of the jumps and any distances between the poles and jumps are correct.

The candidate should show progression and actively encourage feedback from the riders throughout the session. The candidate should be able to give constructive feedback and suggest work going forward. During the discussion the candidate should be encouraged to reflect on their performance and identify strengths and areas that require improvement. The riders can be asked to provide feedback on the value of the session.

Questions regarding Learning Outcome 6 should also be covered in this discussion.
LO6. Understand how to develop own skills The candidate should reflect on their coaching practice, knowledge and skills and have a clear action plan that identifies their strengths and areas of improvement. They should be encouraged to talk about their short and long term aims and how they hope to achieve them. The candidate should understand what CPD is and identify appropriate opportunities to fill in any gaps in their current knowledge and to enhance their knowledge or skills.

Stage 4

Introduction to Stage 4

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 candidate follow safe and efficient practice they can apply when working with any horse, whether mare, gelding, stallion or youngster. The age and sex of the horse should be checked, before commencing work and a brief study of type, conformation and the tack should be made if appropriate.

Skills Record

All candidates must present their signed skills record on the day of assessment. Failure to do so will result in the candidate not being able to take their assessment. If a candidate does not present their skills record you must call the office.

For learning outcomes that are assessed fully on the day:

- The ready for assessment section in the skills record should have been signed; this records the candidate is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.

For learning outcomes that are assessed via VIVA on the day:

- Ensure the trainer endorsement section in the skills record has been signed; this records an assessment with the trainer has taken place

Unit 1: Stage 4 Senior Care

Candidates must show that they have the required qualities and can apply the basic principles of good horse husbandry. They must be able to maintain effective performance under pressure, be able to use specialist tack in a safe and efficient manner and understand the management of competition horses. They should be able to understand how to maintain the physical well-being and care of a variety of different kinds of horses (old, young, breeding stock, and so on) and apply the relevant nutritional requirements to each.

The Care unit is divided into four sections; A, B, C and D. Section A and B are the practical sessions and you will work through the following topics but not necessarily in this order:

- Tack, equipment and training aids
- Assessing static and dynamic conformation
- Anatomy including muscle groups, tendons and ligaments
- Treatment and rehabilitation

Section C and D are viva assessments which will be a short assessment covering the sections that have been assessed and signed off by the trainer.

Skills Record

Part of the Stage 4 Care assessment is covered within the skills record.

In Unit 1: Stage 4 Senior Care, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Be able to use specialist tack in a safe and efficient manner	On the day assessment
LO2.	Understand nutritional requirements of horses	VIVA
LO3.	Understand the management of competition horses	VIVA
LO4.	Be able to maintain a horse's physical wellbeing	On the day assessment
LO5.	Understand the care of horses	VIVA
LO6.	Understand how to care for mares and youngstock	VIVA
LO7.	Understand the care of older horses	VIVA

Section A (LO 1) – is a practical session with one assessor working with up to two candidates.

Section B (LO 4) - is a practical session with one assessor working with up to two candidates.

Section C (LO 2,3) - contains the learning outcomes that are trainer endorsed and so need to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criteria from each of these learning outcomes will be identified on the observation sheet sent from the office, and it is important that this is the criteria assessed on the day.

Section D (LO 5.6,7) - contains the learning outcomes that are trainer endorsed and so need to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criteria from each of these learning outcomes will be identified on the observation sheet sent from the office, and it is important that this is the criteria assessed on the day.

When assessing via a VIVA the assessment paperwork will mark which assessment criteria to assess. This assessment should be detailed and cover the breadth of the complete assessment criteria chosen.

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Unit 2: Stage 4 Senior Management

Candidates must show that they have the required qualities and can apply the basic principles of management and show that they are able to manage a team to achieve results. They should be competent in managing daily activities on a yard as well as have the foresight that will contribute to the delivery of projects where necessary. They should be comfortable managing budgets and resources and understand how to liaise with accountants, auditors, and so on. They should have the ability to manage their own personal and professional development, possess excellent interpersonal skills and the ability to adhere to standards and procedures while maintaining confidentiality and integrity.

They must be able to maintain effective performance under pressure, manage situations for the best results for the business and have awareness of commercial realities and marketing opportunities.

Skills Record

Part of the Stage 4 Senior Management assessment is covered within the skills record.
In Unit 2: Stage 4 Senior Management, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand the importance of customer care	VIVA
LO2.	Be able to use interpersonal skills	On the day assessment
LO3.	Be able to manage staff	VIVA
LO4.	Understand requirements for self-employment	VIVA
LO5.	Understand the roles and responsibilities of a yard manager	VIVA
LO6.	Understand financial requirements for an equestrian business	On the day assessment
LO7.	Understand record keeping requirements for an equestrian business	VIVA
LO8.	Understand different marketing opportunities	On the day assessment
LO9.	Understand how to manage a yard	VIVA
LO10.	Understand how to manage grassland	On the day assessment

Section A (LO 2) The topic will be chosen by the assessor on the day but must be taken from the bank of topics for this section. It is important that all candidates are given the opportunity to evidence all of the assessment criteria from 2.2 to 2.6. Each candidate will also need to be assessed on assessment criteria 2.1 (Evaluate own interpersonal skills), candidates can be asked to do this at the start of the discussion when they are introducing themselves or alternatively they could do this at the end of the discussion.

Section B (LOs 1, 3, 4, 5, 7 and 9) - contains the learning outcomes that are trainer endorsed and so need to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criteria from each of these learning outcomes will be identified on the observation sheet sent from the office, and it is important that this is the criteria assessed on the day.

Section C (LO 6, 8 and 10) – is assessed by professional discussion, based around case studies that relate to each learning outcome.

When assessing via a VIVA the assessment paperwork will mark which assessment criteria to assess. This assessment should be detailed and cover the breadth of the complete assessment criteria chosen.

Unit 3: Stage 4 Senior Lunge

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 candidate follow safe and efficient practice they can apply when working with any horse, whether mare, gelding, stallion or youngster. The age and sex of the horse should be checked, before commencing work and a brief study of type, conformation and the tack should be made if appropriate. A dressage saddle or GP saddle may be used.

It is helpful to give a brief to the candidate before they begin lungeing, so they know what is expected. It should be very similar to scenarios they may encounter if working as a groom or trainer.

Example brief:
The horse will be presented tacked up ready for lungeing, but you should adjust the tack and equipment as they would at home. Areas for improvement should be identified early in an initial assessment and the plan of work and exercises carried out should aim to improve the horse's way of going. Poles may be used to enhance the work if appropriate. Asses the horse you are lungeing and determine strengths and areas to improve. Choose work to develop the horse.

If it is not appropriate to use poles (for example, horse is too fresh) then the use of poles can be covered during discussion.

Skills Record

Part of the Stage 4 Senior Lunge assessment is covered within the skills record.
In Unit 3: Stage 4 Senior Lunge, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand how to lunge competition horses	VIVA
LO2.	Be able to lunge a competition horse to develop its way of going	On the day assessment

Section A (LO 1) - contains the learning outcomes that are trainer endorsed and so need to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criteria from each of these learning outcomes will be identified on the observation sheet sent from the office, and it is important that this is the criteria assessed on the day.

Section B (LO 2) – is the practical observation of the lungeing and will be carried out with one assessor to up to two candidates.

Unit 4: Stage 4 Senior Ride For Training Eventing

Spurs may be worn for riding assessments. They should be short and blunt with the shank set centrally to the rear. They must only be used as necessary and the candidate can be asked to remove them if the assessor or centre representative feels they are being misused.

For flatwork riding schooling whips up to 39" can be used, and for show jumping and cross country a short whip between 14" and 30".

The horse will be presented tacked up. Candidates will 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 candidate should be able to work the horse to make the most of the basic gaits and the way of going and identify any strengths and areas for development. They should be able to assess the horse's level of training and ride them to that level. 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. Working at test movements is not a necessity unless this develops the quality of work. It is the ability to improve gaits and way of going that we want to see.

The candidate should be able to ride effectively over show jumps and cross country up to the height required, riding with balance, harmony and confidence. They will ride one horse for show jumping and another for cross country.

Riding the horses

The horses should be ridden the morning of the assessment and assessors are required to have a knowledge of the horse's age, level of training, how they are going and their qualities and areas for development. The assessors can choose to ride the horse/s themselves, or, a senior member of staff at the centre can do this for them. The member of staff must be able to articulate the horse's way of going to a high level. We recommend the lead assessor contact the centre and assessors before the assessment day to discuss this.

Walking the show jumping and/or cross country courses

Assessors must have walked the relevant courses before the briefing. We advise candidates to arrive at least 30 minutes before their start time (stated on their confirmation email), to walk the courses too.

Skills Record

Part of the Stage 4 Eventing Ride assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Ride for Training Eventing, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand the training of young horses	VIVA
LO2.	Be able to ride safely	On the day assessment
LO3.	Understand how to progress the training of a dressage horse	VIVA
LO4.	Understand how to progress the training of a show jumping horse	VIVA
LO5.	Be able to ride a trained horse in a double bridle to develop its way of going	On the day assessment
LO6.	Be able to ride an inexperienced dressage horse with a view to developing its way of going	On the day assessment
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	On the day assessment
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	On the day assessment
LO9.	Be able to ride horses used for training others, with a view to developing their way of going	Not required for this unit
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	Not required for this unit

The assessment is divided into the following sections:
Section A (LO1, 3 and 4) – is a one to one professional discussion between the assessor and the candidate to confirm understanding of the topics covered in theses learning outcomes by questioning the candidate on ONE of the assessment criteria from each learning outcome.

Section B (LO 2, 5) – will be an observation of two candidates riding horses in double bridles by one assessor. They will share the arena with another assessor and a further two candidates riding inexperienced horses on the flat.

Section C (LO2, 6) - will be an observation of two candidates riding inexperienced horses on the flat by one assessor. They will share the arena with another assessor and a further two candidates riding the horses in double bridles.

Section D (LO2, 7) – will be an observation of two candidates riding horses over a range of show jumping fences by one assessor.

Section E (LO2, 8) - will be an observation of two candidates riding horses over a range of cross-country fences by one assessor.

Unit 5: Stage 4 Senior Ride For Training Dressage

Spurs may be worn for riding assessments. They should be short and blunt with the shank set centrally to the rear. They must only be used as necessary and the candidate can be asked to remove them if the assessor or centre representative feels they are being misused.

For flatwork riding schooling whips up to 39" can be used.

The horse will be presented tacked up. Candidates will 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.

The candidate 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 assess the horse's level of training and ride them to that level. 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. Working at test movements is not a necessity unless this develops the quality of work. It is the ability to improve gaits and way of going that we want to see.

Riding the horses

The horses should be ridden the morning of the assessment and assessors are required to have a knowledge of the horse's age, level of training, how they are going and their qualities and areas for development. The assessors can choose to ride the horse/s themselves, or, a senior member of staff at the centre can do this for them. The member of staff must be able to articulate the horse's way of going to a high level. We recommend the lead assessor contact the centre and assessors before the assessment day to discuss this.

Skills Record

Part of the Stage 4 Dressage Ride assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Ride for Training Dressage, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand the training of young horses	VIVA
LO2.	Be able to ride safely	On the day assessment
LO3.	Understand how to progress the training of a dressage horse	VIVA
LO4.	Understand how to progress the training of a show jumping horse	Not required for this unit
LO5.	Be able to ride a trained horse in a double bridle to develop its way of going	On the day assessment
LO6.	Be able to ride an inexperienced dressage horse with a view to developing its way of going	On the day assessment
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	Not required for this unit

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	Not required for this unit
LO9.	Be able to ride horses used for training others, with a view to developing their way of going	On the day assessment
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	Not required for this unit

The assessment is divided into the following sections:
Section A (LO1, 3) – is a one to one professional discussion between the assessor and the candidate to confirm understanding of the topics covered in theses learning outcomes by questioning the candidate on ONE of the assessment criteria from each learning outcome.

Section B (LO 2, 5) – will be an observation of two candidates riding horses in double bridles by one assessor. They will share the arena with another assessor and a further two candidates riding inexperienced horses on the flat.

Section C (LO2, 6) - will be an observation of two candidates riding inexperienced horses on the flat by one assessor. They will share the arena with another assessor and a further two candidates riding the horses in double bridles.

The candidate will be assessed on learning outcomes 5 and 6 during one session. They will ride each horse for approximately 40 minutes including time taken to discuss the horse with the assessor.

Section D (LO2, 9a) – will be an observation of two candidates riding horses used for training others by one assessor.

Section E (LO2, 9b) - will be an observation of two candidates riding horses used for training others using poles by one assessor.

The candidate will be assessed on learning outcome 9 on two horses. In one session (approximately 40 minutes) the candidate must use exercises that include poles and/or floor patterns following an initial assessment of the horse. A maximum of 7 poles can be used There will be an assistant on the ground to arrange the poles as directed by the candidate. The candidate should choose exercises that they think will be most beneficial to that individual horse. They will ride the other horse as part of a group of up to 2 riders.

Unit 6: Stage 4 Senior Ride For Training Show Jumping

Spurs may be worn for riding assessments. They should be short and blunt with the shank set centrally to the rear. They must only be used as necessary and the candidate can be asked to remove them if the assessor or centre representative feels they are being misused.

For flatwork riding schooling whips up to 39" can be used, and for show jumping and cross country a short whip between 14" and 30".

The horse will be presented tacked up. Candidates will 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.

The candidate 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 assess the horse's level of training and ride them to that level. 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. Working at test movements is not a necessity unless this develops the quality of work. It is the ability to improve gaits and way of going that we want to see.

The candidate should be able to ride effectively over show jumps up to the height required, riding with balance, harmony and confidence.

Walking the show jumping courses
Ensure you have walked the relevant courses before the briefing. We advise candidates to arrive at least 30 minutes before their start time (stated on their confirmation email), to walk the courses too.

Riding the horses
The horses should be ridden the morning of the assessment and assessors are required to have a knowledge of the horse's age, level of training, how they are going and their qualities and areas for development. The assessors can choose to ride the horse/s themselves, or, a senior member of staff at the centre can do this for them. The member of staff must be able to articulate the horse's way of going to a high level. We recommend the lead assessor contact the centre and assessors before the assessment day to discuss this.

Skills Record

Part of the Stage 4 Show Jump Ride assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Ride for Training Show Jumping, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand the training of young horses	VIVA
LO2.	Be able to ride safely	On the day assessment
LO3.	Understand how to progress the training of a dressage horse	Not required for this unit
LO4.	Understand how to progress the training of a show jumping horse	VIVA
LO5.	Be able to ride a trained horse in a double bridle to develop its way of going	Not required for this unit
LO6.	Be able to ride an inexperienced dressage horse with a view to developing its way of going	Not required for this unit
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	On the day assessment
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	Not required for this unit
LO9.	Be able to ride horses used for training others, with a view to developing their way of going	On the day assessment
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	On the day assessment

The assessment is divided into the following sections:
Section A (LO1, 4) – is a one to one professional discussion between the assessor and the candidate to confirm understanding of the topics covered in theses learning outcomes by questioning the candidate on ONE of the assessment criteria from each learning outcome.

Section B (LO 2, 7) – will be an observation of two candidates riding horses over fences up to 1.10m by one assessor. They will share the arena with another assessor and a further two candidates riding inexperienced horses over fences.

The candidate will be assessed on learning outcomes 7 and 10 during one session. They will ride each horse for approximately 40 minutes including time taken to discuss the horse with the assessor

Section C (LO2, 10) - will be an observation of two candidates riding inexperienced horses over fences up to 1m by one assessor. They will share the arena with another assessor and a further two candidates riding the experienced horses over fences up to 1.10m.

Section D (LO2, 9a) – will be an observation of two candidates riding horses used for training others over a grid or related fences by one assessor.

Section E (LO2, 9b) - will be an observation of two candidates riding horses used for training others using poles by one assessor.

The candidate will be assessed on learning outcome 9 on two horses –each of approximately 40 minutes. In one session the candidate must use exercises that include poles and/or floor patterns following an initial assessment of the horse. A maximum of 7 poles can be used. There will be an assistant on the ground to arrange the poles as directed by the candidate. The candidate should choose exercises that they think will be most beneficial to that individual horse. They will ride the other horse as part of a group of up to 2 riders and will work either over a grid or using related distances.

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Unit 7: Stage 4 Senior Coaching Eventing

Candidates must show that they have the required qualities and can apply the principles of teaching/coaching, for example manner, voice, control and positive body language. They must also show that they have the ability to improve both the riders' horsemanship and the way of going of the horse using a progressive plan. They will be expected to ensure that all teaching/coaching is relevant to the riders and their horses and that they are experienced enough to modify sessions to facilitate this. They should be able to evaluate their own performance and plan for their own future professional progression.

Skills Record

Part of the Stage 4 Eventing Coaching assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Coaching Eventing, the assessment methodology is as follows:

Learning Outcome		Assessment method
LO1.	Understand how to coach	VIVA
LO2.	Be able to coach safely	On the day assessment
LO3.	Be able to communicate effectively whilst coaching	On the day assessment
LO4.	Be able to coach a rider on the lunge	On the day assessment
LO5.	Be able to coach a group of riders using poles	Not required for this unit
LO6.	Be able to coach a group of riders over fences up to 1m (3ft 3ins)	On the day assessment
LO7.	Be able to coach a private show jumping lesson in preparation for a 1.10m (3ft 7ins) competition	Not required for this unit
LO8.	Be able to coach a semi private lesson using grid work or related fences up to 1m (3ft 3ins)	Not required for this unit
LO9.	Be able to coach a private dressage lesson at Elementary level	On the day assessment
LO10.	Be able to coach a semi private arena eventing lesson over fences up to 1.10m (3ft 7ins)	On the day assessment
LO11.	Be able to coach a semi private dressage lesson at Novice Level	Not required for this unit

The assessment is divided into the following sections:

Section A (LO 1) - contains the learning outcome that is trainer endorsed and so needs to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criterion from this learning outcome will be identified on the observation sheet sent from the office, and it is important that this is the criterion assessed on the day. This assessment should be detailed and cover the breadth of the complete assessment criteria chosen.

Section B (LO 2, 3, 4) - contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the lunge lesson.

Section C (LO 2, 3, 6) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the group jump lesson.

Section D (LO 2, 3, 9) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the private dressage lesson.

Section E (LO 2, 3, 10) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the semi-private arena eventing lesson.

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Unit 8: Stage 4 Senior Coaching Dressage

Candidates must show that they have the required qualities and can apply the principles of teaching/coaching, for example manner, voice, control and positive body language. They must also show that they have the ability to improve both the riders' horsemanship and the way of going of the horse using a progressive plan. They will be expected to ensure that all teaching/coaching is relevant to the riders and their horses and that they are experienced enough to modify sessions to facilitate this. They should be able to evaluate their own performance and plan for their own future professional progression.

Skills Record

Part of the Stage 4 Dressage Coaching assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Coaching Dressage, the assessment methodology is as follows:

Learning Outcome		Assessment method
LO1.	Understand how to coach	VIVA
LO2.	Be able to coach safely	On the day assessment
LO3.	Be able to communicate effectively whilst coaching	On the day assessment
LO4.	Be able to coach a rider on the lunge	On the day assessment
LO5.	Be able to coach a group of riders using poles	On the day assessment
LO6.	Be able to coach a group of riders over fences up to 1m (3ft 3ins)	Not required for this unit
LO7.	Be able to coach a private show jumping lesson in preparation for a 1.10m (3ft 7ins) competition	Not required for this unit
LO8.	Be able to coach a semi private lesson using grid work or related fences up to 1m (3ft 3ins)	Not required for this unit
LO9.	Be able to coach a private dressage lesson at Elementary level	On the day assessment
LO10.	Be able to coach a semi private arena eventing lesson over fences up to 1.10m (3ft 7ins)	Not required for this unit
LO11.	Be able to coach a semi private dressage lesson at Novice Level	On the day assessment

The assessment is divided into the following sections:

Section A (LO 1) - contains the learning outcome that is trainer endorsed and so needs to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criterion from this learning outcome will be identified on the observation sheet sent from the office, and it is important that this is the criterion assessed on the day. This assessment should be detailed and cover the breadth of the complete assessment criteria chosen.

Section B (LO 2, 3, 4) - contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the lunge lesson.

Section C (LO 2, 3, 5) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the group pole work lesson.

Section D (LO 2, 3, 9) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the private dressage lesson.

Section E (LO 2, 3, 11) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the semi-private dressage lesson.

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Unit 9: Stage 4 Senior Coaching Show Jumping

Candidates must show that they have the required qualities and can apply the principles of teaching/coaching, for example manner, voice, control and positive body language. They must also show that they have the ability to improve both the riders' horsemanship and the way of going of the horse using a progressive plan. They will be expected to ensure that all teaching/coaching is relevant to the riders and their horses and that they are experienced enough to modify sessions to facilitate this. They should be able to evaluate their own performance and plan for their own future professional progression.

Skills Record

Part of the Stage 4 Show jumping Coaching assessment is covered within the skills record.
In Unit 4: Stage 4 Senior Coaching Show Jumping, the assessment methodology is as follows:

Learning Outcome		**Assessment method**
LO1.	Understand how to coach	VIVA
LO2.	Be able to coach safely	On the day assessment
LO3.	Be able to communicate effectively whilst coaching	On the day assessment
LO4.	Be able to coach a rider on the lunge	On the day assessment
LO5.	Be able to coach a group of riders using poles	On the day assessment
LO6.	Be able to coach a group of riders over fences up to 1m (3ft 3ins)	Not required for this unit
LO7.	Be able to coach a private show jumping lesson in preparation for a 1.10m (3ft 7ins) competition	On the day assessment
LO8.	Be able to coach a semi private lesson using grid work or related fences up to 1m (3ft 3ins)	On the day assessment
LO9.	Be able to coach a private dressage lesson at Elementary level	Not required for this unit
LO10.	Be able to coach a semi private arena eventing lesson over fences up to 1.10m (3ft 7ins)	Not required for this unit
LO11.	Be able to coach a semi private dressage lesson at Novice Level	Not required for this unit

The assessment is divided into the following sections:

Section A (LO 1) - contains the learning outcome that is trainer endorsed and so needs to be verified by using the VIVA method on a 1:1 basis with each candidate. One assessment criterion from this learning outcome will be identified on the observation sheet sent from the office, and it is important that this is the criterion assessed on the day. This assessment should be detailed and cover the breadth of the complete assessment criteria chosen.

Section B (LO 2, 3, 4) - contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the lunge lesson.

Section C (LO 2, 3, 5) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the pole work group lesson.

Section D (LO 2, 3, 7) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the private show jump lesson.

Section E (LO 2, 3, 8) – contains the generic learning outcomes 2 and 3 that run through all sections and are assessed with each practical session, as well as the semi-private show jump lesson.