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## Assessor communications

A summary of email communications and updates sent to assessors

Last updated 14.11.2024

This document is confidential and must not be shared

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**08.11.2024**

## **January-April 2025 sort and 2025 Contractual agreement**

Please find below the link to the assessor sort for the period of Jan-April 2025. The sort also includes BHSI dates and Ireland/N Ireland dates for the whole of the year. Please can all offers be received by the end of Monday 25th November – thank you! Please note there will be many more dates confirmed throughout the year.

<https://r1.dotdigital-pages.com/p/74RT-GIQ/thank-you-for-submitting-the-jan-april-2025-sort>

### **Contract and Appendices**

Assessor contractual agreement for the period 1st Jan 2025- December 2025, contract appendices, a declaration of interest form and the IR35 determination letter will be on the Assessor Hub for your reference (they were attached in the original email sent). The IR35 will accompany all future contracts and is information for those of you who provide your services through a personal services company, usually your own limited company.

Appendix 1 refers to the Accredited Professional Code of Practice which can be found on the [APC Hub](#) and should be adhered to by all Education Contractors and which should be read in conjunction with the contractual agreement.

### **Declaration of Interest – mandatory to return**

Appendix 3 is the Declaration of Interest form which must be completed and returned by all assessors annually. If you are engaged, employed or concerned in any other business, trade, profession or other activity which places you in a Conflict of Interest with the BHS, please can you declare this on the form. If you do not have any interests to declare, please can you state N/A on the form. Please can completed declarations be emailed to Ella Steadman – [ella.steadman@bhs.org.uk](mailto:ella.steadman@bhs.org.uk) by 25th November. **We are unable to offer you dates until you have submitted this document.**

The Conflict of Interest policy and the all other Education policies can be found on the [assessor hub](#).

### **Sort return**

In order to submit your offers to assess, confirmation that you have read and agree to the terms and conditions of both the contractual agreement and the IR35, and submission of your DOI form is required via the sort link. If you do not submit confirmation of reading/uploading of these documents, we will be unable to allocate you to any assessments.

When submitting your estimated mileage for attending assessments via your sort return, please do ensure that this is as accurate as possible. Your assistance with this enables us to make the best use of charity funds and is very much appreciated.

### **Observers/probationers**

If you already have "observer/probationer status" agreed, please can you indicate this against each assessment offered by typing the letter O or P after your name when offering to observe/probation. Please could you also send a separate email to me listing your request to observe or probation, the stage which you would like to attend and the date and centre of the assessment/s and we will do our best to help your progression. Please do not offer to observe or probation at any new level of assessment if this has not already been agreed by the BHS Education team, as upgrades are now being granted on a business need basis only.

Please note that as from 1st January 2025, observers will be paid mileage (up to 200 miles) and probationers will be paid mileage (up to 200 miles) and a fee of £75. This decision was made due to assessor recruitment and upgrades now being agreed on a business need basis only. We have also acknowledged the difficulty faced by those assessors who are currently already in the upgrade process and who are struggling to complete it due to the expense in travelling further afield as a result of a shortage of assessments that are able to facilitate observers and probationers.

## **Stage 4 and BHSI**

We now require you to inform us if you are able and prepared to ride at stage 4 and BHSI level ride assessments. Please note that you will be required to state Yes/No/Not Applicable in the mandatory field on the sort to be able to submit offers.

## **Payment**

Please can all full day and part day assessor fee and expense claims be submitted via the payment link which can be found on the assessor hub. Please note that when carrying out online assessments or IQA work online which totals less than 3 hours, please charge an hourly rate of £35 and forward an invoice for payment, as only claims for a full day or a part day can be submitted via the payment link.

## **Emergency contact number**

As part of our ongoing remit to improve our duty of care provision to our external workforce, we would like to hold an emergency contact number for a family member or close friend of each assessor. Please can I kindly ask you to click on the link below and provide a number for a family member/friend who is happy to be contacted in case of an emergency.

<https://wkf.ms/3zYTiWq>

This person would only be contacted where there is a concern for your welfare or other extreme circumstances. As such, we have a legitimate interest in processing this information during the contractual relationship to maintain accurate and up to date records of who to contact in an emergency situation. We will only retain this information for the duration of the deployment contract or until we are notified that this information is no longer correct. Once the data is no longer needed it will be deleted from our records.

Should there be a change to your emergency contact details, please can you ensure you amend the details via the link which will be made available on the Assessor Hub, or notify Jenny Wall as soon as possible. Thank you so much. Your co-operation is very much appreciated and will help us to better support and safeguard you in your duties as an assessor.

I would like to take this opportunity to say thank you so much for your support of the Education Department over the last year – the work you do is very much appreciated. Hopefully together we can continue to build on candidate numbers, strengthen relationships with our existing stakeholders and create new partnerships in the future.  
Jenny.

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**24.10.2024**

### **Latest version of Assessor Guidance**

The Assessor Guidance has been updated. Please find version 2.7 on the Assessor Hub.

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**24.10.2024**

### **Update on the BHS language guide**

We have recently updated the BHS language guide on the BHS Website - <https://www.bhs.org.uk/about-us/how-we-operate/our-policies/diversity-equality-and-inclusion-documents/>.

Please note, this information is also available on the assessor hub.

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**16.10.2024**

### **Stage 5 assessments – Lead Assessor Report Form**

Please can I gently remind all assessors that at Stage 5 there is still the requirement for a Lead assessor report form (centre feedback) to be completed for each assessment, including the relevant paperwork if not handed to member of the BHS team on the day – accident forms and risk assessments.

This can be submitted via the usual form found here: <https://wkf.ms/44X96Ch>.

If you have recently led a stage 5 assessment, please can you complete this retrospectively as soon as possible.

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**27.08.2024**

### **Stage 2 Coach – Completing online feedback.**

There seems to be some confusion when completing feedback for Stage 2 Coaching specifically in relation to Learning Outcomes 3 and 4, (Be able to Coach safely and Be able to demonstrate lesson management skills).

When a candidate is recorded as Not Achieved in the drop down menu, all of the Stage 2 Coach outcomes will be listed. Select against each Learning Outcome whether the candidate has achieved or not.

When selecting "Not Achieved" a drop-down box will appear for narrative as to why. As you move further down the list of outcomes, 3 and 4 are at the bottom of the document directly above general comments. A drop-down box is not provided however, as stated in the form, the candidate can only be successful in Learning Outcomes 3 and 4 if all practical outcomes have been achieved. Therefore, these boxes should be marked as Not Yet Competent unless a candidate has achieved all practical outcomes. Any commentary related to these outcomes may be detailed against the unsuccessful practical outcome.

Please also remember the same is the case for Stage 3 Coach Learning Outcomes 2 and 3; Be able to Coach safely and Be able to demonstrate lesson management skills must be marked as Not Achieved if any of the practical outcomes have been recorded Not Achieved.

### **Centre Reports**

There have recently been some mismatches when reporting on centres following assessments. If you are part of a Team, please ensure if there is anything to report back on, the lead is informed before you leave the assessment.

Please could we ask Leads to ensure assessors are asked during the day before the team leave if there has been anything that needs to be reported back to the office.

Please contact Julian Campbell ([julian.campbell@bhs.org.uk](mailto:julian.campbell@bhs.org.uk)) if you have any queries regarding any of the above,

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**25.07.2024**

### **Assessor Guidance Update**

Following recent quality assurance activity which suggested a perceived discrepancy between the results sheet/Qualification Specification and Assessor Guidance for Stage 3 Dressage Ride Learning Outcome 2.3, (use exercises to improve the horses' way of going), please note that the Assessor Guidance has now been edited to read as follows:

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.

I hope this clarifies the expectation in relation to this Learning Outcome but if further assistance is needed, please contact [julian.campbell@bhs.org.uk](mailto:julian.campbell@bhs.org.uk) who will be able to provide further advice. We have also made the following recent updates to the Assessor Guidance. Please can you ensure that you review these and come back to us with any questions?

Version Number	Page	Reason for changes made	Date
2.6	44	Timings changed for Stage 2 jump to one hour	26.07.2024
	24	Video link added: Best practice for communicating with a translator	
	46-48	Updated Stage 3 Care unit	
	48-52	Updated Stage 3 Ride unit	
	17	Updated the 'sharing information with assessors' section for Access Arrangement applications	

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#### **16.07.2024**

##### **Amendment to Stage 2 Teach Centre Guidance - Lead rein lesson**

Following some recent feedback regarding the difficulty sourcing genuine beginner riders for the lead rein lesson within the Stage 2 Teach assessment, we have taken the decision to reduce the minimum age of volunteer riders in this session only.

With immediate effect, riders may take part in the lead rein session from the age of 4, providing that the centre's own insurance policy and licence conditions cover riders of this age, and the children have sufficiently developed communication and listening skills. Previously, the minimum age of riders for this section was 6 years.

Hopefully, this may enable centres to provide a more realistic scenario for candidates delivering the lead rein lesson as part of the Stage 2 Teach assessment. Revised Centre Guidance is available on the Assessor Hub and will also be circulated to our Assessment Centres. This includes further details about parental supervision/observation during Stage 2 Teach assessments in relation to children who are acting as volunteer riders.

Thank you for keeping up to date with our current policies and please do come back to me if you have any questions in relation to this change.

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#### **02.07.2024**

##### **Reminder: re the welfare and safety of horse and rider at assessments**

##### **Welfare and safety of horse and rider at assessments**

Please can I gently remind you that if you have any concerns with the welfare and safety of the horse and/or rider at an assessment, please ensure that appropriate provision is taken to ensure that their well-being is not compromised. If the warm-up time is not felt to be sufficient, please feel free to take extra time to ensure you are happy to proceed. If you feel strongly that an assessment should be discontinued, or a candidate stopped on the grounds of health and safety, we will support you in this decision.

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**20.06.2024**

## **Important reminders - Lead Assessor Report Form, & Managing Candidate Falls at Assessments**

Please see below a few gentle but important reminders:

### **Lead Assessor Report Form**

As per the Assessor contract and appendix, Lead Assessors must electronically submit the Lead Assessor Report Form using the link on the Assessor Hub, together with any applicable accident reports and the risk assessment no later than 48 hours after the assessment date. Please ensure also that the correct documents are being submitted, (the current versions can be found on the hub so please don't use up old stock of paper forms). If in any doubt, please contact the Education Department.

It is the responsibility of the Lead Assessor to submit an accident report form following an accident or near miss to any personnel involved in an assessment, (including for volunteer riders at coaching assessments). A copy of the accident form should be left with the assessment centre.

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### **Managing candidate falls at assessments**

As per 7.1 of our Accidents policy, if a candidate has fallen at any time during their ridden assessment they are not permitted to remount. The candidate should be withdrawn from the ridden assessment and any further ridden assessment that day. This is to ensure the health and welfare of the candidate. They may take part in further non-ridden assessments if they wish to do so but if the candidate is under 18, permission must be sought by the assessor from their nominated parent or carer before allowing them to continue.

All our policies can be found on the assessor hub.

Please can we ask that assessors do not promise or discuss with candidates their being given a free re-sit following a fall. This decision is for the Education Department to make and to communicate to the candidate after the assessment when the results and reports have been received.

Thank you so much for your continuing support. Please do not hesitate to contact me if you have any queries or concerns regarding your assessing role.

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**11.06.2024**

## **Clarification on the role of Internal and External Quality Assurers at BHS assessments**

Now that our internal and external quality assurances processes are fully embedded in our operations, we felt it would be helpful to clarify the roles of Internal and External Quality Assurers at BHS assessments to answer some of your frequently asked questions.

### **Internal Quality Assurance**

BHS Education are responsible for deploying Internal Quality Assurers (IQAs) to assessments. Their attendance may be routine or due to an identified risk and the activity may be in-person on the assessment day or via a virtual Teams meeting arranged retrospectively. On-the day IQA activity may be announced or unannounced.

The role of BHS IQAs is to report on some or all of the following:

- how well an assessor adheres to BHS Education Policies and Procedures
- how an assessor adheres to and samples BHS assessment criteria
- an assessor's organisation, customer service and inter-personal skills
- an assessor's presentation and professionalism
- an assessor's questioning technique



- the reliability of an assessor's assessment decisions
- the candidate feedback given by an assessor
- the impartiality of an assessment
- the suitability of the horses, equipment and facilities provided by an approved assessment centre
- the implementation of a specific process, (for example access arrangements or risk assessment)

During an IQA visit, the IQA will observe the assessor working. While IQAs aim to be supportive and helpful, assessors should not ask IQAs for a second opinion on their assessment decisions during the assessment and IQAs will only intervene where safety or welfare may be compromised. Sometimes feedback will be provided by the IQA on the assessment day but following each IQA activity, an IQA Report will be produced and sent to BHS Education. This is shared with the relevant assessors and/or centre and with BHSQ for regulated assessments.

### **External Quality Assurance**

Our regulated awarding body BHSQ are responsible for deploying External Quality Assurers (EQAs) to regulated assessments. Their visits may be announced or unannounced, in-person or they may take place virtually after an assessment.

- The external verifier will have a focus for their activities. This may be very specific or general. As a consequence, external verifiers may carry out different activities over different time periods.
- The external verifier may change their focus depending on what they find.
- They may arrive before the start of the day or part way through. Likewise, they may leave before the end of the day. The visit is not time constrained.
- They may explain to the assessment team what they find or they may wish to discuss this further and so not provide feedback during their activities.
- They always aim to be supportive and helpful.
- They will not generally intervene in assessment. However, if they consider practice is unsafe, or that the welfare of any horse or person is being compromised, they will intervene.

The role of EV and quality assurer (EQA) on the assessment day is to monitor practice during assessment of BHSQ qualifications. This is to decide if assessment is accurate and if candidates and others are safe. It includes monitoring the internal verification of assessment.

The EV/EQA may speak to candidates to understand their experience. It is useful for BHS to explain to candidates that an EV/EQA may visit and that there should be no impact on their experience. This should help alleviate any worry.

Following an EQA in-person or virtual activity, BHSQ will submit a report to BHS Education, including recommendations to be discussed or compulsory actions to be completed by BHS Education. Confirmed results cannot be released to candidates until all IQA and EQA activity is complete so please do respond promptly if requested to attend a retrospective IQA or EQA meeting following an assessment. Please do consider your potential availability to attend any such post-assessment meetings when offering to assess.

### **What happens next?**

Recommendations and actions from IQA and EQA reports are considered by BHS Education during regular Quality Improvement meetings and the findings also feed into the risk ratings for assessors and assessment centres. This helps us to identify trends and informs our cycle of continuous quality improvement which aims to enhance the candidate experience and ensure we continue to meet our regulatory requirements. This information also enables us to make necessary adaptations to ensure that BHS qualifications remain fit for purpose.

Thank you very much for engaging with our internal and external quality assurance activities and please do come back to us with any further questions.

## **Evening assessor training CPD points**

It has been agreed that all of the evening sessions that have been recently confirmed (including the sessions that have already taken place on 22nd and 29th April) carry 1 CPD point.

If you attend and would like your APC record to be updated please complete the feedback form using the link below:

<https://forms.monday.com/forms/69c13bca0d770ca69f128a4059693c43?r=use1>

All upcoming events can be found on the Assessor Hub (look for the Assessor Training menu).

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**30.04.2024**

### **Update on hat standards and clarification on dress code**

#### **Update on hat standards**

Please familiarise yourself with the updated information on hat standards. You can find this in the Assessor Hub.

#### **Dress code clarification**

Please note clean jeans are acceptable to wear during care/lunge assessments.

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**19.04.2024**

### **Assessor training attendance**

As per previous correspondence, this year's face to face assessor training will take place on Thursday 26th September 2024 at:

Aintree International Equestrian Centre,  
Ormskirk Road  
Aintree, Liverpool  
L9 5AS

Further details and the exact timings are still tbc.

Please can you confirm your attendance by clicking on the link below:

<https://buytickets.at/thebritishhorsesociety2/1229188>

As per your contract, we ask that all assessors attend this annual standardisation training. It is an important part of the assessing role and enables assessors to be cognisant with the latest syllabi, guidelines, policies and assessing techniques.

If you are unable to attend the training, please let Jenny Wall know in writing [jenny.wall@bhs.org.uk](mailto:jenny.wall@bhs.org.uk)

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**19.04.2024**

### **Clarification on assessment criteria for Stage 2**

In order to clarify assessment criteria for Stage 2 please note the following:



**Lungeing:**

A brief should indicate the horse is being lunged for exercise to include walk, trot and canter as appropriate. Work is inclusive of working both with and without side reins.

Equipment may be either a roller or saddle. Centres do not have to provide saddles for all horses it is acceptable for horses to be in rollers.

When making a judgement it is purely on what is presented. The fact that successful completion allows candidates to Stage 2 Teach SHOULD NOT INFLUENCE THE DECISION.

The candidate can either lunge to the required standard or not. The assessment must only be against the published criteria which does not include any reference to Stage 2 Teach or progressing to lunge the horse with a rider.

**Please further note in relation to Stage 2 Care:**

Criteria 5.1 States: Describe methods used to weigh a horse. The assessment method is listed as observation/discussion. This means that a candidate may show how to take a weight measurement as this maybe the best way for them to describe the criteria.

Showing how to do something with a descriptive element would cover a discussion. Where the candidate is asked to demonstrate this is what must be done. A description does not meet the requirement to demonstrate; but a demonstration may meet a descriptive need.

Further examples are.

8.2 Demonstrate how to administer an oral treatment. The candidate must show how this is done.

10.3 Describe how to remove a shoe. Candidates would often be advantaged by showing what they would do, without removing a shoe.

**Stage 2 Jumping**

If horses are used to jumping fillers, they may be included within the Stage 2 jumping course but this is not compulsory and centres are encouraged to build a simple course that meets the requirements, comprising of fences which their horses are familiar with jumping. Specifically, this means that the course should be numbered and included 7 fences. It should not include a double but related distances are acceptable. The course should include at least one change of rein and four of the fences should be spreads. The height of the fences should be up to 75cms and safety cups need to be used on the back pole of all spreads.

I hope this clarification is helpful and please do contact [julian.campbell@bhs.org.uk](mailto:julian.campbell@bhs.org.uk) with any questions.

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**22.03.2024****Evening Teams sessions for assessors with Julian Campbell**

Julian Campbell will be holding some evening sessions via teams over the coming months. These sessions will be covering a range of topics and are an opportunity for assessors to gain clarification or simply engage in discussion with fellow assessors over a hot drink or glass of wine!

Please note they are not mandatory to attend, however your support of these sessions is very much appreciated. Please see below details of the dates and links to book on. A joining link to the sessions will be sent to all those booked on prior to the session.

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**April 22<sup>nd</sup> 18:30-20:00 - Feedback**

A discussion on providing feedback for both successful and unsuccessful candidates. Using observation sheets.

<https://buytickets.at/thebritishhorsesociety2/1198391>

### **April 29<sup>th</sup> 18:30-20:00 - Briefings**

A discussion on the introduction and start of the day. Section briefings matching to the level of the qualification. Completing centre report.

<https://buytickets.at/thebritishhorsesociety2/1198463>

### **May 7<sup>th</sup> 18:30-20:00 – Lead assessor training**

For new leads or those leading a team for the first time.

<https://buytickets.at/thebritishhorsesociety2/1198508>

### **May 15<sup>th</sup> 18:30-19:15 – 4:1 candidate ratio**

Stage 2 and Stage 3 assessments - working with four candidates.

<https://buytickets.at/thebritishhorsesociety2/1198530>

### **May 20<sup>th</sup> 18:30-20:00 – General FAQ's**

General recurring questions. Risk assessment, First Aider, Safeguarding, Ground poles, Stage 2 Teach.

<https://buytickets.at/thebritishhorsesociety2/1198535>

### **June 10<sup>th</sup> 18:30- 20:00 - Translator guidance**

Guidance for working with translators to include documentation and recording.

<https://buytickets.at/thebritishhorsesociety2/1198543>

If you are unable to attend a particular session that you are interested in, we can arrange for an individual catch up with Julian or we may be able to hold another session if there is enough interest.

### **Consultation - Devolved Stage 1's at riding schools**

We would like to invite those assessors who assess devolved Stage 1's in riding schools to a consultation with Julian to share any issues or concerns regarding the running of these assessments. If you would like to take part in this consultation, please click on the link below. A joining link to the consultation will be sent prior to the evening.

### **May 13<sup>th</sup> 18:30-19:15 – Devolved Stage 1 assessments at riding schools**

**Please note - Please only book on this session if you cover devolved Stage 1 assessments which run at riding schools.**

<https://buytickets.at/thebritishhorsesociety2/1198514>

Thank you all for your continuing support. Julian is very much looking forward to seeing many of you on these sessions over the coming months. We hope you find them informative and enjoyable.

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## **19.03.2024**

### **Update to health and safety policies and documents**

Please note that the following health and safety policies/documents have been updated and are live on the [Assessor Hub](#).

Accidents at Assessments Policy  
Assessor Guidance  
Risk Assessment for BHS Assessments  
Accident and Near Miss report form

Please let me know if you have any queries.

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**13.03.2024**

**'Near Miss' definition**

There has been some confusion as to the definition of a near miss at an assessment and what types of incident need to be reported. Please note the following definitions:

An **accident** is an unexpected event which results in injury or illness of a person.

**Near miss** is an unexpected event which does not involve injury or illness to a person or horse.

An example of a near miss which could have resulted in an injury but didn't, is a horse standing on a person's foot and making contact with the boot and not the foot. Another example may be a horse becoming loose and wandering into an area where candidates are present, even if it is caught with no incident.

Please note that all accidents and near misses need to be reported using the *Accident and Near Miss Report Form*. This must be passed to the Lead Assessor on the assessment day and submitted to BHS Education via the Lead Assessor Report Form.

Further information can be found in the "Accidents at BHS assessments" policy. All current policies can be found on the [Assessor Hub](#).

Thank you very much for your assistance with this and please don't hesitate to contact me if you have any queries or concerns.

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**07.03.2024**

**Save the date! Assessor Training Thursday 26 September at Aintree Racecourse Equestrian Centre**

Please can you save the below date in your diaries for important face to face assessor training:

**Thursday 26th September 2024**

Aintree International Equestrian Centre,  
Ormskirk Road  
Aintree, Liverpool  
L9 5AS

We will be in touch with more details in due course.

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**28.2.2024**

**Assessor update newsletter**

We are very grateful to have received so much feedback from the autumn 2023 assessor training days. As promised, we have collected all the information and questions we gathered from you and provide clarification and updates below. We endeavour to take it all on board and where possible use it to improve our processes going forward. Please see the slides used during the training for your information (these will be posted on the Assessor Hub).

**The use of tablets for assessors to complete their results/feedback**

We are happy to pilot the use of tablets for results and feedback. If you have a tablet and would be willing to take part in a pilot where the use of tablets is tested, then please express this on the below link by the end of 15th March.

<https://r1.dotdigital-pages.com/p/74RT-D82/thank-you-for-your-response>

### **The length of time it takes to complete results and reports**

If you have any suggestions on how to reduce the time taken, any ideas are much appreciated and can be emailed to me – [jenny.wall@bhs.org.uk](mailto:jenny.wall@bhs.org.uk)

### **Skills Record**

The use of the skills record will be reviewed at the APCED group meeting. The Stage 4 Skills Record sign off will remain in its current form, however we will look to provide further clarification on the website and candidate communication.

### **Afternoon briefing**

It appears that many assessors find the afternoon briefing challenging. There will be further discussion surrounding briefings with our Awarding Body BHSQ to see if the briefings can be shortened. Further communication and updates to the assessor guidance will follow.

### **Reasonable Adjustments and Access to fair assessment when there is a change of lead at short notice**

An internal process has been implemented to ensure that when there is a change in the lead assessor at short notice, they are notified of any candidates with reasonable adjustments and access to fair assessment.

### **Good feedback from candidate experience forms**

Unfortunately, the candidate experience forms are not frequently filled out by candidates who have had a good experience. We will be looking at different platforms and when to send this out to candidates to try and improve this.

### **Assessors feeding back on IQAs**

We will always welcome feedback on the IQAs. All feedback can be submitted in writing to [education@bhs.org.uk](mailto:education@bhs.org.uk). All feedback is read and reviewed for further action. It is the lead's responsibility to introduce the IQA or any other person attending the assessment to the candidates and to each assessor and state why they are there.

### **Informing assessors of the outcome of the centre feedback form**

All feedback provided from the assessors is always read and actioned accordingly. This will then be fed into the risk rating against the centre. The follow up from the Education Team may not always be appropriate to share back to the assessor.

### **Train the trainer days on coaching**

We have started running evening Train the Trainer talks surrounding coaching and have had a huge take up on this. Further talks and courses will be considered. The coaching qualification is under review this year to see if the lessons asked are at the correct level. The use of poles at Stage 4 will be a discussion topic as it is felt that candidates do not do this well enough on an assessment day.

### **Candidates booking an assessment after multiple fails**

We are unable to stop candidates who have had previous multiple fails from booking on to an assessment, however during an assessment if there is a concern on safety or welfare, the assessor should stop the assessment and make the Education Team aware. We will then work with the candidate to ensure they are aware of the importance of training before booking their next attempt.

### **Improving the clarity of observation sheets**

We have worked with a group of assessors to produce new versions of the observation sheets and these will be in circulation going forwards. If you have any feedback regarding the assessment paperwork, please do email [education@bhs.org.uk](mailto:education@bhs.org.uk)

### **Condensing of the risk assessment**

We are currently reviewing the whole risk assessment document and also trying to make it easier for assessors to upload.

## **Mapping paperwork to be made electronically**

We will be moving the mapping documentation digitally and assessors will be sent the online forms once they have been created.

## **Clarification of timelines for submitting feedback following IQA**

If you are selected for IQA, you will normally be required to submit your feedback for any sampled candidates to the IQA by email before uploading it to our online results platform. Our expectation is that you will submit this feedback to the IQA within 48 hours of the assessment date. The IQA will review your feedback and reply with any suggested edits or development points within 24 hours. You will then need to implement any changes and upload the finalised candidate feedback to the online results platform within 96 hours of the assessment date. On some occasions, the IQA activity may not include a review of feedback or you may be asked to send feedback to the IQA for all candidates you have assessed – where this is the case, the IQA should clarify this with you on the assessment day.

## **Preparing a horse to travel**

The skill being assessed is the safe handling of the horse in preparation for loading. Please refer to page 41 (Stage 2) of the assessor guidance for clarity on the use of bridles – Assessor Guidance is on the Assessor Hub

## **Stage 2 lungeing candidates**

Candidates are able to lunge either in tack or a roller.

## **Assessor clothing**

The branded red coats/gilets do not need to be worn on assessment days, however we do ask that assessors continue to attend in smart and plain clothing and official assessor name badges must be worn throughout the assessment. Provision of lanyards is being investigated and further information on this will follow.

## **Timetables**

The Education Team will prepare a draft timetable to the best of their knowledge 4 weeks prior to the assessment date. It will be sent to the centre and lead assessor so we can be notified if it does not work. At least 3 weeks before the assessment date, the Education Team will email the final version and post the timetables. If it does not work on the run up to the assessment due to candidates pulling out or centre issues, it is the responsibility of the lead assessor to ensure the centre and assessor team have been updated on any amendments. If a candidate's start time must be changed, please notify the Education Team as soon as possible so we can contact them. We only offer a template of the timetable and it is up to the assessors and centres how they manage each section – eg Care A and the order to run the learning outcomes.

## **Request for book of assessor contact details**

Unfortunately we are no longer able to provide assessors with contact details for all assessors due to GDPR. We are only able to provide details of those who you will be working with and you may not ever have a business need to contact certain assessors (eg due to location). We will continue to email the relevant contact details in the closing down email.

## **Results**

Following on from the email on information relayed from BHSQ regarding feedback, we would like to reiterate that you do not need to put a comment next to an achieved learning outcome. Further guidance will be updated in the assessor guidance shortly.

## **Height of Stage 3 jump fences**

The Stage 3 ride is being reviewed in 2024 and further communication will follow. We will also review if the care, lunge, flat and SJ ride can be made available all year round.

## **Emergency contact details for assessors**

Going forwards, the Education Team will ask for emergency contact details for all assessors annually. Further communication will follow.

### **The use of CCTV**

The use of CCTV is for security purposes and is not for reviewing assessments. We will update the candidate terms and conditions to highlight there may be CCTV in operation. All centres should have signage up where CCTV is in use. Please refer to the centre guidance which is available on the assessor hub.

### **Promotion of smaller centres**

We promote all of our assessment centres equally and continually strive to call up waiting lists and previous candidates to book them on to all upcoming assessments.

### **UK candidates taking assessments in the Republic of Ireland**

The Education Team does not discourage candidates to fly over to the ROI for assessments.

### **Stage 2 and 3 assessments running in devolved format**

Unfortunately, the Stage 2 and Stage 3 assessments cannot return to a devolved format due to them being regulated qualifications. We have to follow a strict quality assurance policy and this is challenging when running in a devolved format.

### **Loose ground poles under fences**

The use of Ground poles in a British Horse Society assessment is permitted. However, should the positioning of such poles be considered to either have the potential to be unsafe or have a negative impact on horses and riders then action should be taken by the assessor.

In the case of riding assessments, consultation with the centre representative or in higher level and coaching assessments, questioning and discussion with the candidate to clarify their understanding is required.

Continuation of the exercise should only be permitted when it is considered safe and will further a positive response to riders.

### **Level of demo riders at Stage 3**

Please refer to the centre guidance where all levels of demo riders are detailed per stage. If it is felt that the demo riders given are not to the required standard, please discuss this with the centre.

### **Face to face standard setting day in Scotland**

This is currently on hold, but will be considered next time we run assessor training sessions.

### **Direct entry**

Please refer to the direct entry section of the website - <https://www.bhs.org.uk/careers-recreational-awards/assessments-information/direct-entry-guidance> If you have any further questions relating to direct entry, please email the Education Department – [education@bhs.org.uk](mailto:education@bhs.org.uk)

### **Online worming module**

New candidates no longer need to complete the online worming module as part of the Stage 3 syllabus, however if they started the Stage 3 Care before 20th February 23, they will need to complete it if they would like to complete the qualification. Please refer them to the Education Team if you have anyone with questions surrounding the online worming module.

### **Gentle reminders**

### **Accommodation**

If requiring accommodation for assessment dates, please can you indicate this on the sort link when offering or in a separate email to [jenny.wall@bhs.org.uk](mailto:jenny.wall@bhs.org.uk)

### **Submitting results**

When submitting online results or reports, we require the Assessment ID number which can be found on the candidate results summary. It is a 5 digit number and tends to start with a 4. It is really important this is inputted so our reporting system knows which assessment it relates to when it is submitted.

### **Ratio of candidate numbers at Stage 3**

A reminder that we are now running Stage 3 care, lunge and ride in a 1:4 ratio. If you have any feedback on the running of the day, please email [education@bhs.org.uk](mailto:education@bhs.org.uk).

### **Assessor hub**

Please remember that all information pertaining to the assessor role and any updates can be found on the assessor hub. Please remember this link is for assessor use only.

<https://pathways.bhs.org.uk/assessor-documents/>

### **Falls Policy**

A reminder that the falls policy applies to assessments across all levels including devolved Stage 1 assessments. Please refer to the policy and assessor guidance sections on the assessor hub.

### **Distances**

There has been some assessor discussion recently regarding the brief for the class lesson Stage 2 Teach. Please note:

Learning outcome 7 is: Coach an integrated flat work and jumping lesson.

Learning Outcome 7.2: Coach a group. The guidance states, Group lesson as detailed in 7.1, to include • Rider position • Walk, trot, canter and jumping up to 75cm including a double or related distance.

Therefore, as a minimum requirement, candidates must work with two related fences measuring the distance between.

### **Updates**

#### **Assessor training in 2024**

Please note that attendance of assessor training is an extremely important requirement of the assessor role. It is expected that the face to face training will take place in the autumn – more details to follow.

#### **Hat standards update**

Please note, there has been an update to the hat standards. Please refer to the assessor hub for the latest information.

#### **Translator role description**

Please note, the Translator Role Description has been updated and the new version is now available on the assessor hub. The Translator Guidance has also been revised and the new version will shortly be incorporated into the existing Assessor Guidance. This will also be sent directly to any assessors who are working with translators in the mean time.

Thank you once again for your feedback. We appreciate your continuous support. Please do not hesitate to contact me if you have queries or concerns.

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### **9 January 2024**

#### **Clarity on candidate feedback**

Following a recent meeting with our awarding body BHSQ, we have been requested to share the following email from Julie Gibson (BHSQ Responsible Officer) with you all. If you need further clarification on this, please do not hesitate to contact me.

“Thank you for your discussion today about the need for clarity in candidate feedback. To summarise we discussed how to ensure a candidate is not in any way misled when they receive their provisional results.



In other words, they understand feedback at this point is provisional and does not indicate achievement of a qualification. We were of course in agreement about the importance of this.

I wanted to take this opportunity to explain it is important that assessors make comments about the performance of the candidate in relation to the specific required standards.

For example, when an assessor decides a candidate has achieved, they may state:

“In this learning outcome, you met the required standards because you”...then stating specifically what the candidate did.

Likewise, when an assessor decides a candidate has not met the required standards they may state:

“In this learning outcome, you have not met the required standard because” ...then stating specifically what the candidate did or failed to do or did incorrectly.”

It would be better for assessors not to draw any summative conclusions about assessment in provisional feedback.

For example, stating to candidates they have achieved a qualification. In other words, I would not state: “Well done you have successfully achieved .....

This could be misleading as results could change following internal and external verification”

Thank you as always for all your expertise, experience and enthusiasm and I hope to see many of you during the course of the year.

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## **24 November 2023**

### **Confirmation of Jan-April sort, the latest panic list and other important information**

Thank you again to all who offered in the last sort (Jan-April 2024). Your support is very much appreciated. Confirmation has just been emailed to all those who have been selected or who have had a recent change to their schedules.

### **Selection of BHSI dates/IQA's/observers & probationers**

Please note confirmation of selection for the BHSI dates and IQA/observer/probationary allocation will follow shortly.

### **Change to IQA policy**

We have amended our IQA policy for next year. Some IQA's are now going to be announced and therefore confirmed on your schedule. If you are being IQA'd you may need to share some of your candidate feedback with the IQA before uploading it to the results form. Following your IQA you will normally receive an IQA report on your performance on that assessment day. The IQA will go through this full process on the day.

### **Assessments under previous syllabi**

Some assessments are still running in some regions under previous syllabi. All assessments on your schedule which are detailed as “BHS Stages” are under the current syllabi. Assessments under previous syllabi do not have the “BHS” prefix. We try and be clear to highlight the different assessment types at the time of offering them for selection, however if you have been allocated to an assessment you are not comfortable conducting then please let us know immediately.

### **Latest panic list**

Please see below the link to the latest panic list. Please can all offers be received by the end of Monday 27th November – thank you.

<https://r1.dotdigital-pages.com/p/74RT-CGV/thank-you-for-submitting-the-panic-list>

### **Declaration of Interest form (DOI)**

Please note the Declaration of Interest form must be received once annually for each calendar year. If you have already emailed it to us in respect of 2024 when you offered for the recent sort then you do not need to send it again. You will need to just tick the mandatory field on the panic lists/sorts going forward, to confirm you have submitted it. If you did not offer for dates in the last sort, then you need to email the DOI form to Ameer (amee.cashmore@bhs.org.uk) so that you can offer for this panic list and future sorts/panic lists.

The form can be found attached in the original email or on the Assessor Hub.

### **Riding at Stage 4 and BHSI riding assessments**

As per my email for the Jan-April sort, we now require you to inform us if you are able and prepared to ride at stage 4 and BHSI level ride assessments. Please note that you will be required to state Yes/No/Not Applicable in the mandatory field on the sort to be able to submit offers.

### **Assessor Training**

Thank you to all those who attended one of our two recent assessor training days. I hope you found it enjoyable and informative. We collected a lot of constructive feedback from you and we will be in touch to communicate what we are doing to take this forward. For those who were unable to attend, we will be in touch shortly as to how we can update you.

### **Change to Stage 2 and Stage 3 candidate:assessor ratios**

The recent change to Stage 2 and 3 assessment assessor/candidate ratios was discussed at the recent training days. If you were unable to attend and we have allocated you to these level of assessments (or you intend to offer), then please can you contact me and we will arrange for you to have an update prior to the assessment.

### **Assessor hub**

A little reminder that all information regarding assessor guidance, feedback links, policies and updates can be found on our assessor hub. Please see the link below:

<https://pathways.bhs.org.uk/assessor-documents/>

### **Teams sessions with Julian**

We will be holding a series of Teams sessions with Julian Campbell on hot topics in response to the feedback from the training days. These sessions are not mandatory, but are to provide you with an informal opportunity to chat through any issues, update yourselves, or simply enjoy a discussion with your fellow assessors. I will be communicating the dates of these in the new year.

Finally, I would like to thank you once again for your continued support. If you have any queries or concerns, please do not hesitate to contact me.

Jen

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### **3 October 2023**

Lead Assessor Report – change to process

The Risk Assessment Form, Centre Feedback and Accident reports can now be submitted following each assessment using one link which you can find below:

<https://wkf.ms/44X96Ch>

Lead assessors will now need to complete this report within 48 hours of each assessment. Please note it will not generate any extra work and will enable you to log in once to submit all 3 documents rather than sending

separate emails. This link can also be accessed from the Assessor Hub. Please let me know if you need any support with using the form or uploading documents.

Thank you for your continuing support.

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### **20 September 2023**

#### **Message from Michele Carman – Clarification of result terminology**

We have recently had a few anomalies with result sheets due to candidates deciding not to complete an assessment, or if they fall off and are not allowed to continue.

For clarity

- If a candidate starts an assessment – even if it's for 1 minute and do not complete for whatever reason, then they are a **Fail**. However if they fall off towards the end of a session and have demonstrated all of the required parts of the Learning Outcome (LO) successfully, they may **Pass**.
- If for any reason they do not start a LO, then they are **Absent**.
- The only time they are **Withdrawn** is when they are not allowed to progress to the jump section following the flat assessment – ie they are withdrawn by the assessor.

I hope this helps when completing the feedback sheets! Please come back to me if you have any further queries on this.

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### **13 September 2023**

#### **Online results – inputting the assessment ID number**

Please can we kindly ask if you can fill out the assessment ID number on the online results when you submit them. This Assessment ID number can be found on the top of the main list summary which you should receive within the assessment pack. Thank you

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### **3 August 2023**

#### **Printed copies of syllabus**

If you would like to have a printed copy of the syllabi for the assessments for which you are eligible to assess, can you please let me know and I will arrange for them to be posted to you. Please can you list the level of the assessment you require in your email. Don't forget, copies of all syllabus are available for you in the Assessor Hub too.

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### **25 July 2023**

#### **Safeguarding and good practice whilst driving for business**

As part of our duty of care and safeguarding of our external workforce whilst on BHS contracted work, we would like to remind you of safe driving etiquette and introduce a new element of good practice. Please ensure that whilst driving on long journeys you adhere to the rules of the Highway Code and the following common sense guidance:

**Driving when you are tired greatly increases your risk of collision. To minimise this risk**

- **make sure you are fit to drive. Do not begin a journey if you are tired. Get sufficient sleep before embarking on a long journey**
- **plan your journey to take sufficient breaks. A minimum break of at least 15 minutes after every two hours of driving is recommended**
- **if you feel sleepy, stop in a safe place. Do not stop in an emergency area or on a hard shoulder of a motorway**

We strongly encourage that where possible (when more than one assessor is required) when hiring a car for business purposes that there are at least two named drivers on the insurance. This will reduce risk when hiring a car abroad for assessments in case of illness or any other incident that might affect the primary named driver. The extra cost is minimal and will be reimbursed by the Society.

**13 July 2023**

### **Updates to assessor guidance**

There are some new updates to the assessor guidance which can be found on the assessor hub. Please can you take time to familiarise yourselves with the following changes:

#### **Change control**

Version Number	Page	Reason for changes made	Date
2.3	32-33	Updated guidance for video call assessment	11.07.2023
2.3	5	Updates to contact details for the Education Team	11.07.2023
2.3	7	Added 'Level 2 Foundation Coaching Riders' to the BHSQ list	11.07.2023

### **Recognition of Prior Experiential Learning (RPEL) / Direct entry**

Please familiarise yourself with our updated RPEL direct entry guidance – particularly if you are asked to provide a reference or assessor endorsement/verification.

We have updated our process for RPEL and you should be informed by a member of the Education Team (usually Janice or Gemma) on what should be included in your reference. This ensures all the required observations are evidenced.

We have also introduced an RPEL route for learners where achieving all, or some, Stage 2 assessments are a barrier for entering our coaching pathway. Learners are able to evidence their skills, knowledge and understanding via alternative methods offering flexibility where required. Similar to our standard RPEL an assessor verification is required.

In any situation where you are asked to provide a reference/endorsement/verification for a direct entry application we ask that you contact the Education Development Team in the first instance. Guidance regarding RPEL is on the Assessor Hub.

### **Submission of results**

When submitting results, it appears for some assessors the autofill feature pre-populates the box for the candidate's name with your own. Please can you take care to ensure you enter the candidate's name in the relevant box – thank you so much!

### **Health, Safety and Welfare of Candidates, Horses and Others**

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.

This guidance is on page 10 of the assessor guidance. It is also covered in our 'Accidents at BHS Assessments Policy', 'BHS Health and Safety Policy' and the 'Education Contractor Agreement'. Always refer to the Assessor Hub for the current version. We are also preparing a policy for Horse Welfare at BHS Assessments; further updates to follow when this is live.

### **Stage 2 Learning Outcome 3 Be able to prepare a horse to travel**

One of the updates from the qualification review earlier this year surrounded the 'handling for loading' criteria at Stage 2. Please note the following update, and refer to the specification when assessing.

We have updated the assessment criteria for 3.2 – handle a horse safely in preparation for loading. The emphasis for this criteria are the handling skills and not loading of the horse (this is covered in the Skills Record).

At an assessment, 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. Please refer to the qualification specification for the assessment criteria.

This guidance is on page 41 of the assessor guidance. Always refer to the Assessor Hub for the current version.

### **Assessor Training**

Due to a large number of assessors being unable to make the 24th August assessor training day at Ingestre Stables, we have rescheduled it to Thursday 2nd November at Ingestre. We have also arranged an additional training day following feedback from assessors for whom Ingestre was too long a journey. This day will be held on 20th October at Wellington Riding. The information and updates include some important changes to candidate ratios so please do your best to attend one of the days. The training will count as 6 CPD points and a timetable will follow nearer the time.

Please click on the below links to book on your preferred training day:

20th October – Wellington Riding (Hampshire) 9:30am-4:00pm

<https://buytickets.at/thebritishhorsesociety2/961962>

2nd November – Ingestre Stables (Staffordshire) 9:30am-4:00pm

<https://buytickets.at/thebritishhorsesociety2/961973>

Please can you book on by 30th September – thank you.

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**30 May 2023**

**New system for Assessor/IQA fees and expenses**

As part of improving our internal processes, a new system has been developed to enable invoices to be processed by our Finance department in a more efficient way. The aim of these changes is to ensure prompter payment and so they should benefit you, our workforce as well as us internally.

Instead of submitting invoices using the template - for all assessments taking place from 1st June please can you submit your fee, mileage and any other expenses using the link below. This link will be available on the assessor hub. You will receive an automatic email confirming detail of your submission – please allow a few days for this to come through.

<https://forms.monday.com/forms/1314c12d0d0f6f6e411734ee2f09b394?r=use1>

When additional expenses are incurred (such as food, toll and accommodation), receipts must be uploaded. Please note, unfortunately once you upload a document you will not be able to open it again. If there is a problem with the document then we will let you know if there are any issues.

In the event that you are cancelled from an assessment, please use the separate link below.

<https://forms.monday.com/forms/6ff5e5d141c8d6b2c54f299688ed60b8?r=use1>

Please note this new process is for assessing and IQA work only and you are unable to submit the details for more than one assessment at a time. If you carry out contractual work as a presenter at training/college days or any workshop days at HQ, please can you invoice us as before using the invoice template.

We anticipate that payment will be made much faster than before, however please allow 20 days for payment to be processed. Thank you so much for your support with these ongoing changes. It is very much appreciated.

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**19 May 2023**

**Updates to assessor guidance**

There are some new updates to the assessor guidance which can be found on the Assessor Hub. Please can you take time to familiarise yourselves with the following changes:

Version Number	Page	Reason for changes made	Date
2.2	13	Addition of advice re: pregnant candidates	10.05.2023
2.2	20	New section: Translators	10.05.2023
2.2	25-27	Update to Candidate Briefing section	10.05.2023
2.2	30	Update to information following an accident	10.05.2023
2.2	35	RPL and APC Hub updates	10.05.2023

**Neck straps**



Please note it is at the discretion of the centre as to whether neck straps are fitted to horses used in ridden assessments. A neck strap should be fitted for the lead rein lesson in Stage 2 Coach assessments and a neck strap or breast plate should be fitted to horses used in lunge lessons at coaching assessments.

### **Candidate ID**

When asking for candidate ID, please note it does not have to be their BHS membership card. It can be any form of photographic ID.

### **Translators**

If candidates require translation at an assessment and have not booked a translator, please note that informal translator arrangements must not be made. A declaration must be signed by an official translator who has been authorised by the office and the declaration must be submitted alongside the results. Please consult with the office if you are unsure of how to proceed.

### **Communication**

Please note that where there is a team of assessors allocated at an assessment, it is the responsibility of the lead to ensure that communication with the other assessors takes place very soon after the assessment information is received. This will allow for any queries, conflicts of interest, concerns about the programme etc to be discussed and sorted out in advance of the assessment day to help ensure that candidates have a smooth experience.

### **Results**

There has been some mis-communication from assessors to candidates as to the time period for results to be received. Provisional assessment results will be emailed to the candidate within 15 working days from the assessment, via the email address provided at the time of booking, unless a quality assurance activity raises a concern. Confirmation of their final result will be sent by email following on from any further quality assurance checks that are carried out. Any certificates due will be sent by post shortly after. Candidates are asked to allow up to 28 days for the certificates to be delivered. The Education Team are unable to give out results over the telephone.

### **Observing at assessments**

Please be mindful of how candidates may feel if observed by multiple assessors and try to avoid being present in an area where an assessment is taking place if you are not directly involved in either assessing or quality assuring the assessment. If you are observing an assessment in a pre-arranged official capacity or are acting as an Assessor Mentor, please ensure that the reason for your presence is explained to the candidates.

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## **11 May 2023**

### **New links to submit results**

We are currently trying to streamline our operational processes to improve efficiency in the office. One of the processes is that of the results. There will be new links for you to submit through, but please note there will be very little change for you as assessors. The new link for the Stage 1 is now on the assessor hub and the links for the other stages will follow in due course. As from immediate effect, please could you submit all future results for the Stage 1 via the new link. Please see the link to the Assessor Hub for all important documents, policies and information.

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## **4 April 2023**

### **Clarification on accident policy**

We are very aware that there have been many policy updates in the last few months and consequently a tremendous amount of information has been relayed to you. We are very appreciative of your time and support in attending the training and update sessions. It has come to light however that there appears to be some confusion surrounding our accident policy. If a candidate falls at any time during their ridden assessment they are not



permitted to remount. The candidate must be withdrawn from the ridden assessment and any further ridden assessment that day if additional ridden units are scheduled.

I would like to clarify that if you have sufficient evidence to make a clear judgement against the assessment criteria as either competent or not yet competent, the result will stand. It is therefore possible for a fallen candidate to be successful in the ridden assessment. If a candidate falls before the assessor has sufficient evidence to make a clear judgement against the assessment criteria the BHS may offer a free or discounted resit.

If the candidate is involved in an accident which does not result in a fall, it is their decision (or parent or carer of a candidate under 18 years of age) whether they wish to continue with the remaining assessment.

Always refer to the current policy on the Assessor Hub.