

# Partnership Progress Playbook



## Important Notes

- This is an education checklist - not a “how to do it” explanation but a checklist designed to keep you on track and progressively moving forward
- These skills are a foundation that will take you to the top of whatever your equestrian sport choice is
- Equine is to be calm, quiet and responsive to the light, invisible ask
- You can choose to do as many of the sections in each level that are applicable to your goals (but General Knowledge Skills are a required section no matter what your choice is)
- All skills MUST be successfully completed on both sides of your equine (if applicable)
- There may be tasks asked in a previous Level but not asked for in the other Levels. These tasks should be completed at each level going forward
- REMEMBER to reward to the try. Expect a lighter response the next time
- Set yourself and your equine up for success and only choose tasks/gaits that you or your equine is ready for
- Take time and just WAIT! Don't rush. The most important maneuver is RELAX and REWARD!
- Be patient and calm and don't get frustrated. Reset and start again
- Be particular but not judgemental. Strive to make the next attempt better than the last one
- Assess the tasks and gaits based on the level your horse is currently at. Be honest. Review tasks frequently as training progresses
- Get your tasks solid before asking for more advancement
- Ask for things in different locations and at different heights to limit destination addiction
- **Remember to have FUN and be entertaining to your equine. Don't drill tasks over and over. Mix tasks up!**



Learning  
IS  
FUN!

be  
Creative

Stay  
Present

YOU Can  
Do THIS

\* STAY  
Positive \*

learn  
SOMETHING  
- new -  
EVERYDAY

# Self Rating Scale Information

Each number is information, not criticism—it simply tells you where your partnership is today.

## Key Philosophy (Aligned with NES Values)

*Change your thinking to change your success!*

- Progress not Perfection
- Awareness not Judgment
- Softness not Force
- Consistency not Intensity

## How to Use the Self Evaluation Scale

After each session, rate each task:

Perform the task

Reflect honestly

Assign a number (1–5)

Write a short note (on separate paper)

Set a micro-goal (on separate paper)

Example:

Task: Canter transition on left lead from walk and canter full lap

Rating: 3

Note: Smooth upward transition, needs better balance on corners

Next Goal: Maintain rhythm for full arena

## Interpretation Guide

Average Score Training Focus

1–2 Foundation & Clarity

2–3 Consistency & Confidence

3–4 Refinement & Softness

4–5 Flow & Partnership

5 Mastery & Expansion



ACCOMPLISH  
MINDSET  
MOTIVATION  
SUCCESS

## Self Evaluating Score Breakdown

### 1 — Introduction Stage = “Learning Begins”

Task is just being introduced.

Requires significant guidance, reminders, or correction.

Inconsistent understanding or execution.

Focus is on awareness and exposure.

👉 Goal: Build familiarity and confidence.

### 2 — Developing Stage = “Effortful Success”

Task can be completed, but with difficulty.

Requires strong focus, visible cues, or repeated asking.

Rhythm, balance, or timing may be inconsistent.

👉 Goal: Improve consistency and reduce resistance.

### 3 — Progressing Stage = “Comfortable but Improving”

Task is completed fairly easily.

Still shows small weaknesses in timing, softness, or accuracy.

Cues are clearer and more reliable.

👉 Goal: Refine quality and reduce excess effort.

### 4 — Proficient Stage = “Soft & Skilled”

Task is completed with proficiency.

Requires minimal, light asking.

Maintains balance and rhythm for a short duration.

Shows confidence and understanding.

👉 Goal: Increase duration and consistency.

### 5 — Mastery Stage = “Invisible Communication”

Task is completed with an almost invisible ask.

Flow of gait and rhythm is fully maintained.

Relaxed, responsive, and willing.

Partnership feels effortless.

👉 Goal: Maintain and transfer skill to new situations.

## Progress Through Practice

In equine education, growth isn't always a straight line. Sometimes stepping back helps you move forward. By reviewing and improving past skills, you strengthen your foundation and make today's work easier and more successful. Every step is part of your progress.



1-5 LEVEL 3 - GENERAL HORSE KNOWLEDGE SKILLS		DATE
	Discuss and recognize the symptoms of colic and know what to do	
	Recognize which injuries require veterinary care and which may be treated with minimal care	
	Discuss and understand the precise vaccinations required in your area and how often they should be administered	
	Demonstrate how to clean a sheath and an udder thoroughly	
	Discuss and identify at least five harmful local plants/foods	
	Explain laminitis/founder, tying up, choking, ulcers, thrush, and skin diseases, as well as their causes, symptoms, and treatments	
	Discuss stable and pasture management, covering: Daily horse care, including turnout schedules; Parasite management; Grass management; Various fencing and bedding alternatives; Regular upkeep of the facility; biosecurity	
	Able to hose bath your horse with an assistant	
	Able to use clippers to trim bridle path and other areas	
	Discuss how often your horse should be seen by a vet and what services they should provide	

1-5 LEVEL 3 - GROUND SKILLS	DATE
Demonstrate how to send horse out on a 20' circle (horse yields front end away from you) and trot/jog at least 3 circles continuously (with few corrections)	
Demonstrate how to redirect your horse into a new direction from a distance at a trot/jog (maintaining gait)	
Demonstrate how to demonstrate downward transition of speeds and halts maintaining the same distance	
Demonstrate how to execute spiral in and out circles while maintaining gait	
Demonstrate how to play ½ circle game along fence/wall at trot/jog. Turn, face and wait	
Demonstrate how to send horse Sideways down the wall away from handler (legs correctly crossing, with fluid movement and head down and correct bend in body at trot/jog)	
Maintain correct body position on a circle with inside bend and straightness	
Demonstrate how to play Zig Zag game at trot/jog (drawing horse)	
Demonstrate how to play Zig Zag game at trot/jog (driving horse)	
Demonstrate how to wiggle rope, your body, touch ground etc. while horse stays relaxed at a trot/jog	
Demonstrate how to use a flag all over horse (on, over, under and around) while horse stays relaxed at halt	
Demonstrate how to use a flag all over horse (on, over, under and around) while horse stays relaxed at walk	
Demonstrate how to use a flag all over horse (on, over, under and around) while horse stays relaxed at trot/jog	
Rope around hind quarters exercise, with correct bend and disengaging (Burpee) Horse to follow soft feel	
Expose horse to different energy from you (so horse learns to read an ask to move or it's just you wiggling and means nothing to horse)	
Calmly travel over a tarp or other different surfaces	
Demonstrate how to send horse out, around and draw back to you from a distance. Use a marker/pylon	
Demonstrate how to swing rope from side to side of horse with horse staying calm and head down. Handler in front of horse	
Demonstrate how to swing rope from side to side of horse with horse staying calm and head down. Handler standing at shoulder of horse	
Demonstrate how to draw horse from a distance and stop horse beside the mounting block and handler can go up and down mounting block	
While handler standing on mounting block, Demonstrate how to rub horse all over and lay their body weight over horse's back and rub them all over	
Demonstrate how to pick up all 4 feet from one side of the horse	
Demonstrate how to flip your rope over your horse's head from side to side while standing in front of your horse from at least 4 feet away. Horse should be calm and unreactive	
Demonstrate and discuss benefits of backing horse through gates/doors etc.	

1-5 LEVEL 3 - ROUND CORRAL SKILLS with HALTER & ROPE		DATE
	Demonstrate Friendly Game with Carrot Stick while horse is trotting/jogging	
	Demonstrate how to trot/jog circles with proper bend (with few corrections)	
	Demonstrate how to complete upward transitions smoothly with a light ask	
	Demonstrate how to play ½ circle game along the fence/wall at a trot/jog	
	Demonstrate how to send horse Sideways down the rail away from handler at a trot/jog(legs correctly crossing, with fluid movement and head down and correct bend in body)	
	Demonstrate how to play Zig Zag game maintaining trot/jog (drawing horse)	
	Demonstrate how to play Zig Zag game maintaining trot/jog (driving horse)	
	Demonstrate how to complete downward transitions smoothly	
	Demonstrate how to draw from end of 12' rope and stop horse beside the mounting block and handler can go up and down mounting block	
	While handler standing on mounting block, Demonstrate how to rub horse all over and swing leg over horse's back	
	Add obstacles and play at walk and trot/jog	
	Demonstrate how to bounce/jump around and your horse stays calm and relaxed while maintaining gaits. (Be like a kid)	
	Demonstrate how to ground drive/long rein your horse safely at a walk	
	Demonstrate how to ground drive/long rein your horse safely at a trot/jog	
	Demonstrate how to ground drive/long rein your horse safely at a back up	

<b>1-5 LEVEL 3 - TACKING UP SKILLS</b>		<b>DATE</b>
	Demonstrate tacking up procedures with horse at liberty in arena	
	Ask horse to come sideways towards handler who is holding the saddle pad/blanket on their arm	
	Demonstrate bridling procedure while on off side of horse	
	Demonstrate saddle procedure while on off side of horse	
	Discuss the proper procedures to grooming and getting ready to tack up a horse when out in the open (no fencing)	

1-5 LEVEL 3 - UNDER SADDLE SKILLS		DATE
	Demonstrate posting/rising trot on correct diagonal and be able to identify diagonal by feel - no looking	
	Demonstrate sitting trot/jog	
	At the trot/jog, drop stirrups and pick them up again without glancing down	
	Demonstrate a trot/jog on a loose rein maintaining direction	
	Demonstrate and discuss what a "concentrated" rein is	
	Demonstrate walk, trot/jog on a concentrated rein	
	Demonstrate sideways on the rail (proper position, legs crossing properly, fluidly and head low)	
	Discuss the benefits of carrot stick riding	
	Demonstrate carrot stick riding at walk	
	Demonstrate carrot stick riding at a trot/jog	
	Demonstrate balancing and suppling exercises while riding on the long line at walk and trot/jog without reins and stirrups	
	Demonstrate lateral flexion to inside of circle at a walk	
	Demonstrate lateral flexion to outside of circle at a walk	
	Demonstrate lateral flexion to inside of circle at a trot/jog	
	Demonstrate lateral flexion to outside of circle at a trot/jog	
	Demonstrate a shoulder in at a walk	
	Demonstrate a shoulder in at a trot/jog	
	Demonstrate a haunches in at a walk	
	Demonstrate a haunches in at a trot/jog	
	Demonstrate a shoulder out at a walk	
	Demonstrate a shoulder out at a trot/jog	
	Demonstrate a haunches out at a walk	
	Demonstrate a haunches our at a trot/jog	
	Demonstrate a leg yield from the quarter line to the rail at a walk	
	Demonstrate a leg yield from the quarter line to the rail at a trot/jog	
	Demonstrate halt-to-trot/jog and return to halt transitions with no more than 2 walking steps	
	Demonstrate canter/lope to a stop transitions with no more than 2 strides	
	Demonstrate your understanding of stride length and distances by setting poles for trotting/jogging over	
	Jump a tiny jump, no more than eighteen inches in height	
	Trot/jog a course of at least six ground poles without stirrups maintaining position	
	Trot/jog a figure 8 around 2 pylons (change diagonal in the middle)	
	At the walk stay in a 2-point position for at least 2 minutes	
	At the trot/jog stay in a 2-point position for at least 2 minutes	

<b>1-5 LEVEL 3 - UNDER SADDLE SKILLS</b>		<b>DATE</b>
	Negotiate trail obstacles, such as gates that open and close, turn boxes, sidepasses, back throughes	
	Demonstrate an Emergency Stop and Dismount from a trot/jog	
	Ride bareback with assurance while walking and trotting/jogging, maintaining your balance without using your hands for balance	

1-5 LEVEL 3 - ROUND CORRAL SKILLS LIBERTY	DATE
Demonstrate Friendly Game with carrot stick at walk and trot/jog	
Demonstrate how to 4 trot/jog circles on the rail with proper bend (with few corrections)	
Demonstrate how to complete upward transitions smoothly with a light ask	
Demonstrate how to play ½ circle game along the fence/wall at a trot/jog	
Demonstrate how to send horse Sideways down the rail away from handler (legs correctly crossing, with fluid movement and head down and correct bend in body at trot/jog)	
Demonstrate how to play Zig Zag game maintaining trot/jog (drawing horse)	
Demonstrate how to play Zig Zag game maintaining trot/jog (driving horse)	
Demonstrate how to complete downward transitions smoothly with light ask	
Demonstrate how to draw horse Sideways down the rail toward the handler (legs correctly crossing, with fluid movement and head down and correct bend in body at trot/jog)	
Demonstrate how to send horse sideways (both ways) in the center of the round corral while handler is standing in front of the horse	
Demonstrate how to send horse in a figure 8 pattern around 2 markers at a walk and trot/jog	
While handler standing on mounting block, Demonstrate how to rub horse all over and lay your weight over horse's back	
Demonstrate how to bounce/jump around and your horse stays calm and relaxed while maintain trot/jog. (Be like a kid)	

# PRINT YOUR OWN CERTIFICATES OF SAVVY SUCCESS

- Take the time to successfully complete all of the tasks for each section in this Level
- Self assess your rating for each task to ensure you are ready to move on to the next Level
- Celebrate your success and print the applicable section certificate
- Insert your name and date
- Certificate is designed to print on 8.5" x 11" (regular letter sized paper)
- Once you have self assessed all the tasks in the section(s) you are completing, schedule an official Level Test with NES
- Once the official test has been successfully approved, an official certificate will be issued



# CERTIFICATE OF SAVVY SUCCESS



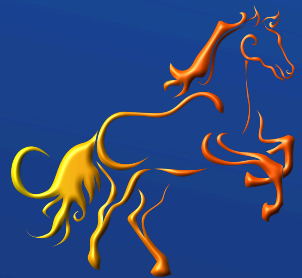
This certificate is proudly presented to

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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 - General Knowledge Skills**

Date: \_\_\_\_\_

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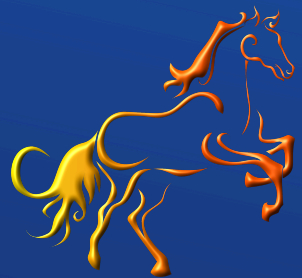
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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 - Ground Work Skills**

Date: \_\_\_\_\_

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# CERTIFICATE OF SAVVY SUCCESS



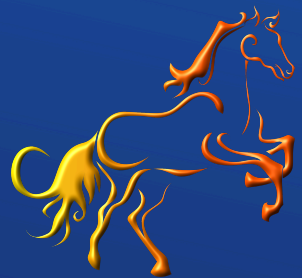
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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 -**  
**Round Corral with Halter and Lead Skills**

Date: \_\_\_\_\_

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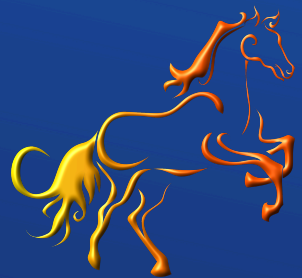
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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 - Tacking Up Skills**

Date: \_\_\_\_\_

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SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



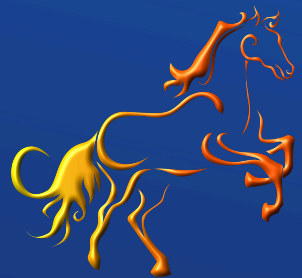
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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 - Under Saddle Skills**

Date: \_\_\_\_\_

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SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



This certificate is proudly presented to

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For completing  
**Naturally Equisavvy Solutions**  
**Level 3 - Round Corral Liberty Skills**

Date: \_\_\_\_\_

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