

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 4 - GENERAL KNOWLEDGE SKILLS	DATE
Discuss the oral structure of a horse's mouth and the necessity of regular dental care	
Discuss different mouth malformities and what concerns they may cause	
Discuss and demonstrate how to check horse's teeth	
Know what your horse's normal gums look like and what the capillary refill rate is	
Discuss the use of side reins and other comparable training tools	
Discuss and demonstrate the location, appearance, and management of the following unsoundnesses: bone spavin, ringbone, sidebone, curb, strained or bowed tendon, splints, and navicular. Discuss about imperfections like bog spavin and windpuffs	
Demonstrate how to hose bath your horse	
Demonstrate how to safely take and gently hold horse's tongue. Discuss dangers	
Discuss how to properly do a full body clip	
What items should be in an equine first aid kit? Where should it be located?	

1-5 LEVEL 4 - GROUND SKILLS	DATE
Demonstrate how to send horse calmly between you and the fence/obstacle (Squeeze). Make the squeeze narrower and narrower at all 3 gaits	
Demonstrate how to stop horse between you and fence/wall/obstacle with confidence	
Play with horse from different heights confidently from all 3 gaits and halt	
Demonstrate how to use flag all over the horse (on, over, under and around) while horse stays relaxed at canter/lope	
Demonstrate how to send horse Sideways down the fence/wall away from the handler (legs correctly crossing, with fluid movement, head down and correct bend in body at canter/lope	
Demonstrate how to redirect horse into a new direction from a distance at a canter/lope (maintaining gait)	
Demonstrate how to play ½ circle game along fence/wall at canter/lope. Turn, face and wait	
Demonstrate how to send horse Sideways down the wall towards handler (only once you have a good stop) (legs correctly crossing with fluid movement, head down and correct bend in the body)	
Demonstrate how to play Zig Zag game at the canter/lope (both drawing and driving the horse)	
Demonstrate how to play with various obstacles while in leading position by the horse's shoulder	
Demonstrate how to play with various obstacles with handler maintaining a distance at least 12' away from the horse	
Demonstrate how to play with various obstacles with different gaits in between the obstacles	
Demonstrate how to back up the horse with softness, head down, fluidly (using your body aids first). Be creative and see how many ways you can	
Demonstrate how to wiggle rope/flag, your body, touch ground, etc. while horse stays relaxed maintaining a canter/lope	
Demonstrate how to demonstrate Lateral Flexion both directions with a soft ask	
Demonstrate how to send horse out and complete several figure 8 patterns at walk, trot/jog, canter/lope	
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 swing leg over horse's back	
Demonstrate how to send a horse into a horse trailer or simulated situation	

1-5 LEVEL 4 - ROUND CORRAL SKILLS with HALTER & ROPE	DATE
Demonstrate Friendly Game with Carrot Stick while horse is cantering/loping	
Demonstrate 5 Allow circles at trot/jog with no more than 1 correction for each circle	
Demonstrate 5 Allow circles at canter/lope with no more than 1 correction for each circle	
Demonstrate how to play ½ circle game along the fence/wall at a canter/lope	
Demonstrate how to send horse Sideways down the rail away from handler at a canter/lope (legs correctly crossing, with fluid movement and head down and correct bend in body at canter/lope)	
Demonstrate how to play Zig Zag game maintaining canter/lope (both drawing and driving horse)	
Demonstrate how to play Zig Zag game maintaining canter/lope (both drawing and driving horse)	
Demonstrate 4 changes of direction at a trot/jog without getting a tight rope	
Demonstrate 4 changes of direction at a canter/lope without getting a tight rope using simple lead changes	
Demonstrate 4 changes of direction at a canter/lope without getting a tight rope using flying lead changes	
Demonstrate changes of speed within 2 strides of the ask smoothly	
Demonstrate how to ground drive/long rein your horse safely at a canter/lope	
Demonstrate ground driving/long reining to teach sideways	
Demonstrate ground driving/long reining to teach haunches in	
Demonstrate ground driving/long reining to teach changes of direction	
Demonstrate how to send horse to any obstacle and cause them to complete the obstacle from a distance of at least 6' away	
Demonstrate being able to draw horse to mounting block from the end of your 22' rope and flip rope over their head from side to side while horse remains calm	
Demonstrate horse standing calmly at mounting block and being able to swing leg over horse and put weight on their back (sit)	
Demonstrate ground driving/long reining at all 3 gaits	
Demonstrate at least 3 different ways to enter/exit the round corral	

1-5 LEVEL 4 - TACKING UP SKILLS		DATE
	Demonstrate tacking up procedures where handler keeps feet still and horse is moved around to complete tacking up	
	Discuss and demonstrate how to safely put saddle, etc on a horse when out in the open (no fencing)	
	Discuss and demonstrate how to safely bridle a horse when out in the open (no fencing)	
	Demonstrate putting bridle on while handler is safely kneeled/sitting down	
	Demonstrate the horse coming sideways to handler while handler holds saddle pad up in the air	

1-5 LEVEL 4 - UNDER SADDLE SKILLS		DATE
	Discuss how to warm up and cool down, taking into account the horse's fitness level, footing, and the weather	
	Demonstrate balancing and suppling exercises for the rider before mounting and after mounted	
	Demonstrate sideways away from the rail (proper position, legs crossing properly, fluidly and head low)	
	Identify what lead you are on within 2 strides (without looking down)	
	At canter/lope, drop stirrups and pick them up again without glancing down	
	Demonstrate canter/lope on a loose rein maintaining direction	
	Demonstrate carrot stick riding at a canter/lope	
	Demonstrate a canter/lope on a concentrated rein	
	Demonstrate how to rate and change speeds within each of the 3 gaits	
	Canter/lope transition from a halt with no walk, trot/jog strides	
	Demonstrate lateral flexion to inside of circle at a canter/lope	
	Demonstrate lateral flexion to outside of circle at a canter/lope	
	Demonstrate a shoulder in at a canter/lope	
	Demonstrate a haunches in at a canter/lope	
	Demonstrate a shoulder out at a canter/lope	
	Demonstrate a haunches out at a canter/lope	
	Demonstrate a leg yield while cantering/loping, from quarter line to rail	
	Halt from canter/lope within one stride of asking	
	Demonstrate walk to canter/lope transitions and back to walk	
	Canter/lope to a stop in 2 strides or less	
	Simple lead changes on a straight line	
	Demonstrate a change of direction at the canter/lope using a simple lead change	
	Demonstrate a change of direction using a flying lead change	
	Able to canter/lope over ground poles with smoothness and maintaining balance	
	Able to cause horse to pick up a counter canter/lope lead	
	Canter a figure 8 around 2 pylons with a flying lead change in the middle	
	Demonstrate your understanding of stride length and distances by setting poles for cantering/loping.	
	Jump a tiny fence, no more than 24" inches	
	Canter/lope a course of at least six ground poles without stirrups	
	At the canter/lope, stay in a 2-point position for at least 2 minutes	
	Maintain control and a safe position while riding at the gallop in a large riding arena	
	Negotiate trail obstacles, such as gates that open and close (both ways), water crossings, ditches, and bridges	
	Demonstrate an Emergency stop and dismount from a canter/lope	
	Ride bareback with assurance while cantering/loping, maintaining your balance without using your hands for balance	

1-5 LEVEL 4 - ROUND CORRAL SKILLS LIBERTY	DATE
Demonstrate how to canter/lope circles on the rail with proper bend (with few corrections)	
Demonstrate how to complete upward transitions smoothly with a light ask	
Demonstrate how to complete downward transitions smoothly	
Demonstrate how to play 1/2 circle game along the fence/wall at a canter/lope	
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 canter/lope)	
Demonstrate how to play Zig Zag game maintaining canter/lope (both drawing and 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 all 3 gaits	
Demonstrate how to send horse in a figure 8 pattern around 2 markers at a canter/lope with lead changes in the middle (simple or flying)	
Demonstrate how to draw horse to the mounting block from a distance	
Demonstrate how to bounce/jump around and your horse stays calm and relaxed while maintain gait at all 3 gaits. (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

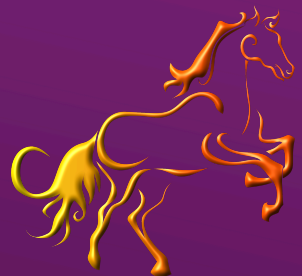


This certificate is proudly presented to

For completing
Naturally Equisavvy Solutions
Level 4 - General Knowledge Skills

Date: _____

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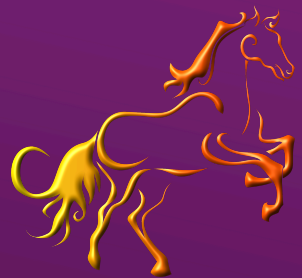


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Level 4 - Ground Work Skills

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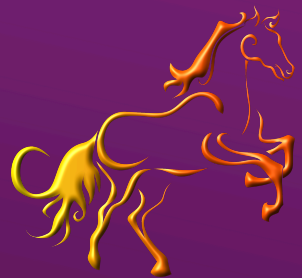


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Level 4 -
Round Corral with Halter and Lead Skills

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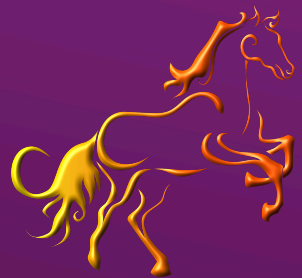


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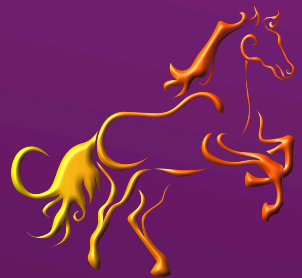


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Level 4 - Under Saddle Skills

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Level 4 - Round Corral Liberty Skills

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