

**NATURALLY  
EQUISAVVY  
SOLUTIONS**

**Foundational Challenges**

# Level 1



**Notice**



**Engage**



**Succeed**

# 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 1 - GENERAL HORSE KNOWLEDGE SKILLS	DATE
	Discuss what is considered safe attire for working around horses	
	When working around horses, I always wear proper footwear and clothes (boots, long pants, etc.)	
	When riding and at other times deemed to be a safety requirement, I wear helmet that has been approved by ASTM-SEI. I can demonstrate how to fit my helmet properly by putting it on and adjusting it myself	
	Understand and discuss barn, pasture, and arena safety regulations	
	Recognize and discuss subtle indicators of tension and discomfort in horses' body language	
	Recognize and discuss subtle indicators of relaxation and comfort in horses' body language	
	Discuss and identify several different types of equestrian sports	
	Identify your choice of equestrian sport	
	Explain why it's necessary to groom a horse	
	Understand the names and purposes of fundamental grooming instruments	
	Discuss and demonstrate the proper steps to grooming	
	Discuss and demonstrate how to (with assistance if needed) and why it is necessary to clean the horse's hooves before and after each session	
	Discuss different halter styles and the use of each	
	Discuss and demonstrate how to put each of them on. Tie correct knot(s) when using a rope halter. (Horse should put head down, be calm and participate in haltering)	
	Discuss and demonstrate how to use an effective quick-release knot to securely tie the horse with a quick release knot, bank robbers knot, tie ring, etc.)	
	Discuss different training methods, including the distinction between positive and negative reinforcement	
	Discuss the advantages and risks of giving food rewards to horses, such as suitable timing, only rewarding desired behavior, and safe food delivery techniques	
	Identify and discuss your horse's major and minor stress signals	
	Discuss different ways to help a horse get past their fear	
	Demonstrate how to put on and remove a blanket/cooler on the horse in a secure manner	
	Demonstrate how to apply bell boots and splint boots correctly. Understand the functions of each and the critical regions that are safeguarded	
	Discuss and demonstrate how to clean and condition a saddle, bridle, and girth/cinch	
	Discuss the importance of cleaning the saddle pad/blanket and girth/cinch. How do you clean them?	
	Identify the different parts of a bridle (English or Western)	
	Identify the different parts of a saddle (English or Western)	
	Take apart and reassemble a bridle on your own	
	Demonstrate that you are able to touch/rub EVERY part of your horse in a safe manner	
	Identify at least ten parts of the horse	
	Identify the different face and leg markings and colors of horses	
	Identify 5 different breeds of horses	

1-5	LEVEL 1 - GENERAL HORSE KNOWLEDGE SKILLS	DATE
	Discuss and demonstrate how to catch a horses safely in the stall	
	Discuss and demonstrate how to safely lead a horse	
	Discuss and demonstrate how to safely lead a horse through narrow spaces, doors and gates	
	Discuss how to turn a horse safely while leading	
	Develop and maintain a health chart and record your horse's normal readings	

1-5	LEVEL 1 - GROUND SKILLS	DATE
	Discuss how your behaviour/energy can affect your horse's behaviour/energy	
	Discuss and demonstrate how to properly approach and maneuver around a horse	
	Understand and talk about the barn, pasture, and arena safety regulations	
	Demonstrate how to put a halter on your horse safely	
	Discuss the purpose of "Friendly Game"	
	Demonstrate Friendly Game with rope all over the horse (toss rope on, over/under & around horse confidently with horse standing still calmly)	
	Discuss and demonstrate how to lead a horse safely with horse following behind you	
	Discuss and demonstrate how to lead a horse safely with the horse beside you	
	Discuss and demonstrate how to turn a horse safely towards you and away from you	
	Demonstrate and explain different methods to stopping your horse while leading	
	Demonstrate and explain different methods to back up your horse while leading	
	Demonstrate how to properly hang up halter and lead rope on the wall when you are finished and what safety steps should be taken	
	Discuss and demonstrate the terms "Asking Energy" and "Non-Asking Energy"	
	Discuss several safety tips when leading a horse with other horses	
	Recognize and discuss subtle indicators of tension and discomfort in horses' body language	
	Demonstrate how to tie your horse safely using a tie ring	
	Demonstrate how to tie your horse safely with a Bank Robbers Knot	
	Demonstrate how to send horse out on a circle at a walk from a standstill. Front end must yield away from you before horse goes out on circle	
	Discuss and demonstrate the Send, Allow and Bring Back	
	Without your horse, discuss and demonstrate how to use phases in your Ask/Send	
	Without your horse, demonstrate how to use your carrot stick and be able to touch a target with the string from 6 feet away	
	Without your horse, demonstrate how to flip your rope over a fence post from side to side from 6 feet away (to simulate flipping it over your horse's head)	

1-5	LEVEL 1 - ROUND CORRAL SKILLS with HALTER & ROPE	DATE
	Demonstrate how to cause horse to keep its attention on you and follow as you walk around without cutting you off or running over your space	
	Discuss and demonstrate how to catch your horse in the round corral	
	Demonstrate Friendly Game with rope all over the horse (toss rope on, over/under & around horse confidently with horse standing still calmly)	
	Disengage hind end using "Porcupine game"	
	Disengage hind end using "Driving game"	
	Disengage front end using "Porcupine game"	
	Disengage front end using "Driving game"	
	Demonstrate how to play Friendly Game with carrot stick all over the horse (toss stick/string on/around/over/under horse confidently with horse standing still calmly)	
	Demonstrate how to wiggle rope/stick, your body, touch ground etc. while horse stays relaxed at a halt	
	Demonstrate how to lead horse with handler staying by the horse's shoulder. Stop, walk and turn	
	Demonstrate how to lead horse behind you and horse maintains distance. Demonstrate how to stop, walk, turn and back up	
	Demonstrate how to disengage hind end from a distance and cause horse to stop and wait	
	Draw horse to you and stop with a safe distance in a straight line	
	Demonstrate how to maintain walk and direction with slack in your rope in 2 Allow circles with few corrections	
	Demonstrate how to redirect your horse into a new direction from a distance at a walk (maintaining gait)	
	Demonstrate how to back horse up with handler being close to the horse (at least 6 steps) lightly	
	Demonstrate how to play 1/2 circle game along the fence/wall at a walk	
	Demonstrate how to switch from Asking Energy to Non-Asking Energy with no dullness or over reactivity	
	Demonstrate how to stop horse beside the mounting block and demonstrate the horse can stand still quietly	
	Demonstrate how to bounce/jump around and your horse stays calm and relaxed. (Be like a kid)	
	Demonstrate how to cause horse to stop and wait (not coming into the center)	

1-5	LEVEL 1 - TACKING UP SKILLS	DATE
	Explain and demonstrate different safe location(s) for tacking your horse up	
	Discuss the proper procedures to tacking your horse & yourself up and the order it should be done in	
	Demonstrate how to expose horse to pressure around belly/cinch/flank areas	
	Show horse the saddle pad/blanket and place it on horses back in proper location with no bucking, kicking, pinning ears, biting	
	Show horse the saddle and place it gently on horses back with no bucking, kicking, pinning ears, biting	
	Demonstrate how to “tent” the saddle pad/blanket and explain why it is important	
	Demonstrate how to safely do up the girth/cinch. Horse can accept girth/cinch being done up lightly with no bucking, kicking, pinning ears, biting	
	If using a back cinch, demonstrate how to safely do it up and explain proper positioning and tightness	
	If using a breastplate or other additional equipment – discuss and demonstrate how to properly put it on	
	Explain why you should move your horse around after putting the saddle on	
	Demonstrate how to move your horse around while carrying saddle with no bucking, kicking, pinning ears at walk, trot/jog and canter/lope	
	Discuss and demonstrate how to present a bit to a horse	
	Demonstrate how to put a bridle on. Horse easily accepts bridle (and bit if used) while handler is standing at horse’s shoulder (head is low and neck wrapped around handler)	
	If putting/leaving halter on, discuss why and how to correctly do this	
	Discuss and demonstrate why you would put safety boots on horse	

1-5 LEVEL 1 - UNDER SADDLE SKILLS	DATE
Discuss and demonstrate a couple different warm-up stretches the handler should do before riding	
Discuss and demonstrate a couple different warm-up stretches the horse should do before riding	
Discuss basic saddle fit and how it affects your horse	
Before I ride, I check the safety of my horse and tack	
Before I mount up, I check the girth/cinch and place the reins over my horse's head	
Discuss and demonstrate the steps of correct mounting (with and without a mounting block)	
Demonstrate how to expose horse to accepting the handler by bouncing/jumping up and down beside the horse in preparation for mounting	
Demonstrate the horse being able to walk up to the mounting block and stand quietly	
Demonstrate the handler being able to walk up and down the mounting block	
Demonstrate how to gather and hold reins for mounting	
Demonstrate being able to put weight in the stirrup with horse standing quietly	
Demonstrate the steps to mounting properly	
Demonstrate and discuss why your horse should stand still for at least 30 seconds after being mounted	
Discuss and demonstrate the steps of securely and correctly dismounting (with and without a mounting block)	
Demonstrate how to pick up both reins and hold them at the proper length in both hands without looking down	
Demonstrate how to hold the reins with one hand and explain why they are held this way	
When my horse is standing motionless, demonstrate a basic balanced position. I constantly strive to keep my eyes up, heels down, and hands quiet	
Describe and demonstrate a pulley/slide rein	
Demonstrate how to correctly shorten and lengthen reins	
While mounted, perform simple stretches and warm-up exercises while standing still and at the walk while someone is guiding my horse on the lead rope	
Describe and demonstrate an independent seat	
At the stop, drop stirrups and pick them up again without glancing down	
At the stop, stand up in stirrups and demonstrate how to keep your balance without using your hands	
Demonstrate and discuss how to do an emergency stop the horse by disengaging its hindquarters, often known as a "one-rein" stop	
At the standstill, do an emergency dismount	
Demonstrate how to cause the horse to walk, stop, and turn using my seat, legs, hands, and voice	
At the walk, drop stirrups and pick them up again without glancing down	
At the walk, stand up in stirrups while keeping your balance without using your hands	
Demonstrate how to do walk-halt-walk transitions while keeping your posture balanced	
Discuss and demonstrate how to perform a reverse of direction on the rail	

1-5 LEVEL 1 - UNDER SADDLE SKILLS	DATE
Discuss and demonstrate how to perform a change of direction across the diagonal	
Demonstrate how to ride my horse right over the center of 3-5 ground poles while keeping my eyes up	
Demonstrate how to walk a basic course with three to five obstacles, showing off your ability to turn and approach smoothly	
Explain why it's crucial to cool my horse down after a session and assist in caring for it after a ride	
Discuss and demonstrate how to safely ride with other horses	

1-5	LEVEL 1 - ROUND CORRAL SKILLS LIBERTY	DATE
	Demonstrate how to cause horse to keep its attention on you and follow as you walk around without cutting you off or running over your space	
	Disengage hind end using "Porcupine game"	
	Disengage hind end using "Driving game"	
	Disengage front end using "Porcupine game"	
	Disengage front end using "Driving game"	
	Demonstrate how to play Friendly Game with carrot stick all over the horse (toss stick/string on/around/over/under horse confidently with horse standing still calmly)	
	Demonstrate how to lead horse with handler staying by the horse's shoulder. Stop, walk and turn	
	Demonstrate how to lead horse behind you and horse maintains distance. Demonstrate how to stop, walk and turn	
	Demonstrate how to wiggle stick, your body, touch ground etc. while horse stays relaxed at halt	
	Demonstrate how to send horse out on a circle from a standstill.	
	Demonstrate how to disengage hind end from a distance and cause horse to stop and wait	
	Draw horse to you and stop with a safe distance in a straight line	
	Demonstrate how to maintain walk circle and direction	
	Demonstrate how to redirect your horse into a new direction from a distance at a walk	
	Demonstrate how to back horse up with handler being close to the horse (at least 6 steps) lightly	
	Demonstrate how to play ½ circle game along the fence/wall at a walk	
	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 walk)	
	Demonstrate how to switch from Asking Energy to Non-Asking Energy with no dullness or over reactivity	
	Demonstrate how to stop horse beside the mounting block and relax	

# 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



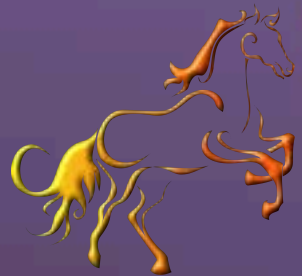
This certificate is proudly presented to

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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 - General Knowledge Skills**

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

**NATURALLY  
EQUISAVVY  
SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



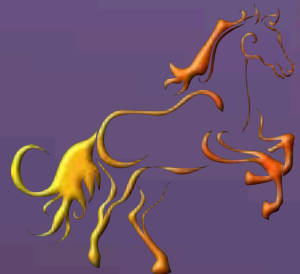
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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 -**  
**Round Corral with Halter and Lead Skills**

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

**NATURALLY  
EQUISAVVY  
SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



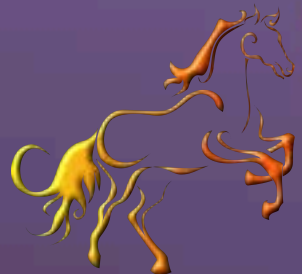
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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 - Ground Work Skills**

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

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# CERTIFICATE OF SAVVY SUCCESS



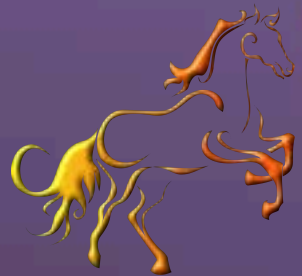
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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 - Tacking Up Skills**

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

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SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



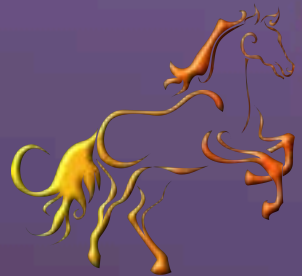
This certificate is proudly presented to

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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 - Under Saddle Skills**

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

**NATURALLY  
EQUISAVVY  
SOLUTIONS**



# CERTIFICATE OF SAVVY SUCCESS



This certificate is proudly presented to

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For completing  
**Naturally Equisavvy Solutions**  
**Level 1 - Round Corral Liberty Skills**

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

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