

# Unit 22: Understand the Principles of Equitation

<b>Unit Code:</b>	<b>K/601/0308</b>
<b>QCF Level 3:</b>	<b>BTEC National</b>
<b>Credit value:</b>	<b>10</b>
<b>Guided learning hours:</b>	<b>60</b>

## ● Aim and purpose

This unit aims to provide learners with an understanding of the principles of equitation. This unit is primarily aimed at learners within a centre-based setting looking to progress into the sector or further education and training.

## ● Unit introduction

This unit will give learners an understanding of how and why theory is fundamental to riding horses

This unit provides the underpinning theory required to complement the practical horse riding units and the background knowledge needed by those seeking employment within the equine industry.

Learners will review techniques used to exercise horses from the ground. They will identify the methods and equipment used and the safety requirements for horse and rider, and develop a knowledge of a variety of techniques, through planning and evaluating the methods used for ground schooling in a variety of situations.

Learners will look at the techniques used for riding horses on the flat and over fences. They will explore the equipment used within each discipline and investigate the terminology and training methodology of these disciplines.

The unit examines methods used for training a variety of horses. Learners will identify and investigate the equipment, techniques and programmes used to introduce young horses to training and to develop or rehabilitate horses. Behavioural and physical issues will also need to be considered within the context of training.

## ● Learning outcomes

**On completion of this unit a learner should:**

- 1 Understand the correct procedures for training horses from the ground
- 2 Understand techniques for training on the flat
- 3 Understand techniques for training over fences
- 4 Know methods used for training horses.

# Unit content

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## 1 Understand the correct procedures for training horses from the ground

*Tack and equipment:* eg bridle, cavesson, roller, side reins, boots, bandages, lunge lines; fit and function

*Ground school techniques:* eg lungeing, long reining, ride and lead, loose schooling; correct procedures

*Health and safety:* personal protective equipment (PPE); rules of the arena; safe handling techniques

## 2 Understand techniques for training on the flat

*History:* training, competition eg military tradition, Spanish Riding School, classical position and adaptations, school movements

*Tack and equipment:* regulations regarding use of tack and equipment in affiliated dressage competition for preliminary and novice tests; bridles; groups of bits; action of bits; saddle design and uses.

*Terminology:* rules of the arena; footfall sequence for all paces; basic school movements; the aids (half halt, leg yield, turn on the forehand, straightness, balance, rhythm, contact, impulsion); acceptance of aids; 'on the bit'; lateral flexion

*Techniques:* coordinated aids; rhythm; impulsion; use of school figures and movements; basic lateral work; safety considerations for horse and rider when riding; influence of rider position on both horse and rider; improvement monitoring; health and safety

## 3 Understand techniques for training over fences

*Tack and equipment:* types and action of bits used for jumping; action and use of martingales; saddle design; regulations regarding use of tack and equipment in affiliated show jumping and horse trial competitions; effect of tack and equipment on rider and horse

*Techniques:* regulations of governing bodies eg BSJA, BE; work over poles; jumping position for show jumping and cross country; phases of jump; adjusting speed; position and gaits; warm up and cool down; health and safety

*Course design:* types of fence for show jumping and cross country (materials, course design and building, related distances, effect on rider and horse); health and safety; planning of courses

## 4 Know methods used for training horses

*Schooling aims:* young horses; rehabilitating horses from injury; re-schooling; maintaining established horses

*Methods:* equipment; scales of training; school movements; training programmes; gymnastic exercises; duration and frequency; environment; facilities and contingency planning; health and safety

*Factors:* conformational strengths and weaknesses; horse and rider psychology; behavioural problems related to training; physical barriers eg previous injury; rider and horse fitness

## Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<b>P1</b> explain how lungeing can be used to train horses [IE, RL]	<b>M1</b> assess effectiveness of selected techniques used for exercising horses from the ground for given training purposes	<b>D1</b> explain in detail a lungeing session and flatwork session including all equipment used, each technique used and the most common problems
<b>P2</b> explain how long reigning can be used to train horses		
<b>P3</b> examine loose schooling as a training method		
<b>P4</b> discuss the history of classical riding	<b>M2</b> appraise the use of training gadgets for given training sessions	
<b>P5</b> discuss the influences of classical riding for training on the flat		
<b>P6</b> discuss the use of tack and equipment for affiliated dressage		
<b>P7</b> explain how ground poles may be used when training horses [CT]	<b>M3</b> discuss most factors relating to a given jumping course design including walking the course, horse and rider performance and training suggestions which overcome problems	<b>D2</b> evaluate course building and fence design within given jumping competitions making valid suggestions of how these may affect horse and rider and how the design could be improved.
<b>P8</b> discuss how grid work or gymnastic jumping is used when training horses		
<b>P9</b> discuss the use of tack and equipment for affiliated jumping		
<b>P10</b> outline the schooling aims for different horses	<b>M4</b> analyse conformational and psychological factors that affect the training of young and rehabilitating horses.	
<b>P11</b> describe the purpose and effect of different schooling methods [TW, SM, EP]		
<b>P12</b> outline factors which may affect or impede the training of a horse.		

**PLTS:** This summary references where applicable, in the square brackets, the elements of the personal, learning and thinking skills applicable in the pass criteria. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

<b>Key</b>	IE – independent enquirers	RL – reflective learners	SM – self-managers
	CT – creative thinkers	TW – team workers	EP – effective participators

# Essential guidance for tutors

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## Delivery

Delivery of this unit will involve practical assessments, written assessment, visits to suitable training and competition venues and will link to work experience placements.

Tutors delivering this unit have opportunities to use as wide a range of techniques as possible. Lectures, discussions, seminar presentations, peer assessment, video/DVD and internet and/or library-based research and the use of personal and/or industrial experience would all be suitable. Delivery should stimulate, motivate, educate and enthuse learners.

Work placements should be monitored regularly in order to ensure the quality of the learning experience. It would be beneficial if learners and supervisors were made aware of the requirements of this unit before any work-related activities so that naturally occurring evidence can be collected at the time. For example, learners may have the opportunity to train horses, and they should ask for observation records and/or witness statements to be provided as evidence of this. Guidance on the use of observation records and witness statements is provided on the Edexcel website.

Whichever delivery methods are used, it is essential that tutors stress the importance of the horses' wellbeing and the need to train them using legal methods.

Health and safety issues relating to working with horses must be stressed and reinforced regularly, and risk assessments (including the necessary insurance coverage) must be appraised before any practical activities. Adequate PPE must be provided and used.

Tutors should consider integrating the delivery, private study and assessment for this unit with other relevant units and assessment learners are taking as part of their programme of study.

It is expected that delivery of this unit will be mainly theoretical, but it may include some practical work to give learners the necessary awareness. Theoretical sessions should be used so learners can develop and apply their awareness and knowledge in a practical context and relate the theory to their own practical experience.

The learning outcomes are directly linked and cover the theoretical aspects of training and schooling horses on the flat and over fences.

Learning outcome 1 covers the correct procedures for training horses from the ground. Delivery is likely to be in the form of formal lectures, discussion, presentations by learners, demonstration, high quality audio-visual materials (for example DVDs and videos of horses competing and training) and independent learner research.

Learning outcome 2 explores the techniques for riding on the flat. Delivery is likely to be in the form of formal lectures, discussion, presentations by learners, demonstration, high quality audio-visual materials and independent learner research. Terminology should cover that stated by the governing bodies and accepted on a national basis.

Learning outcome 3 covers the techniques for riding over fences. Delivery is likely to be in the form of formal lectures, discussion, presentations by learners, demonstration, high quality audio-visual materials (eg DVDs and videos of horses competing and training) and independent learner research. Terminology should cover that stated by the governing bodies and accepted on a national basis.

Learning outcome 4 explores methods used for training horses. Delivery is likely to be in the form of formal lectures, discussion, presentations by learners, demonstration, high quality audio-visual materials and independent learner research.

## Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan gives **an indication of the volume of learning it would take the average learner** to achieve the learning outcomes. It is **indicative and is one way of achieving the credit value**.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Topic and suggested assignments/activities and/assessment
Introduction and overview of the unit.
<b>Assignment 1: Understand the Correct Procedures for Training Horses from the Ground</b> (P1, P2, P3, M1, D1)
Tutor introduces the assignment.
Tack and equipment for lungeing and long-reining horses. Correct technique and reasons for lungeing and long-reining and other methods which can be used to train horses from the ground. Health and safety: PPE; rules of the arena; safe handling techniques.
<b>Assignment 2: Classical Riding</b> (P4, P5)
Tutor introduces the assignment.
History of the classical training of the horse eg military tradition, Spanish Riding School, classical position and adaptations, school movements.
Regulations regarding use of tack and equipment in affiliated dressage competition for preliminary and novice tests; equipment to be worn by horse and rider. Rules and safety precautions to be taken when riding in an arena for training or warming up at competitions. Sequence of steps for all paces; theory required to carry out school movements up to Level 3 standard.
<b>Assignment 3: Tack and Equipment for Flatwork and Other Training Gadgets</b> (P6, M2)
Tutor introduces the assignment.
Tack and equipment for jumping; regulations regarding use of tack and equipment in affiliated show jumping and horse trials competition.
<b>Assignment 4: Use of Ground Poles, Grid Work and Gymnastic Jumping</b>
Tutor introduces the assignment.
Techniques re jumping position for show jumping and cross country; phases of jump; adjusting speed; position and gaits; warm up and cool down; health and safety.
<b>Assignment 5: Course and Fence Design</b>
Tutor introduces the assignment.
Schooling aims for young and rehabilitating horses from injury; re-schooling; maintaining established horses.
Methods of schooling and equipment including scales of training and school movements. Training programmes to suit a variety of horses including gymnastic exercises. Precautions to be taken and health and safety.
Factors that may affect the training of horses: conformational strengths and weaknesses and the importance of understanding horse and rider psychology.
Regulations of governing bodies eg BSJA, BE.
Design of individual fences and courses. Types of fence for show jumping and cross country (materials, course design and building, related distances, effect on rider and horse); health and safety; planning of courses.
Unit review.

## Assessment

For P1, learners will need to explain how lungeing can be used to train horses. An illustration showing the correct techniques and an explanation of the benefits of lungeing would be useful. This could then be taken further for D1 where learners must explain a lungeing session, the equipment to be used, and how the horse should be lunged and any common problems.

For P2 learners are required to explain how long reining can be used to train horses. They can expand on this in M1 by assessing the effectiveness of other techniques that may be used for exercising horses for example riding and leading, loose schooling. This could be incorporated with P3 that requires learners to examine loose schooling as a training method. These criteria could be assessed through an equitation assignment or report.

P4 introduces learners to the history of classical riding, and how methods of riding and training have evolved up to the present time. This leads to P5 where learners discuss the influences of classical riding for training on the flat. P6 requires learners to discuss the use of tack and equipment for affiliated dressage and in M2 they are asked to appraise the use of training gadgets. Again, evidence could be part of an assignment or report that links to earlier criteria.

P7 starts off the preparation for jumping and learners need to explain how ground poles can be used to train horses. P8 then requires learners to discuss grid work and gymnastic exercises. M3 and D2 are closely linked as they cover the related factors of show jumping course design, the importance of walking a course correctly and understanding distances and knowing how to 'ride a good line' to a fence. It is important that tutors teaching the jumping subjects have had experience of riding courses themselves.

For P9, learners are required to discuss the use of tack and equipment for jump work. It is assumed that learners will research the latest safety equipment available.

For P10, learners are required to outline the schooling aims for different horses, it is suggested that they are given a broad range of examples by their tutor and then asked to choose a horse and carry out further investigations.

P11 asks learners to describe the purpose and effect of different schooling methods.

For P12, learners are asked to outline factors which may affect or impede the training of a horse; this is further analysed in M4. Evidence for these criteria could be as part of a presentation or report.

## Programme of suggested assignments

The following table shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, P3, M1, D1	Understand the Correct Procedures for Training Horses from the Ground	You are given a horse to re-train which has 'choppy' steps and carries its their head high: explain what methods you could use to improve the horse's way of going.	Written assignment with illustrations showing how the chosen training aids could help with the horse's physique and improve its movement and self carriage.
P4, P5	Classical Riding	You are asked to explain to someone how the school letters were introduced: discuss the theories involved.	Discussion and question and answer session.

Criteria covered	Assignment title	Scenario	Assessment method
P6, M2	Tack and Equipment for flatwork and Other Training Gadgets	Give a presentation to explain the use of tack and equipment in use at a training establishment.	Observation of presentation. Question and answer session. Witness testimonials from observers/peer reports.
P7, P8, P9, M3, D2	Use of Ground Poles, Grid Work and Gymnastic Jumping	Explain progression from ground poles to grid work and gymnastic jumping to improve a horse's way of jumping and suitable tack.	Illustrated written assignment showing each stage clearly.
P10, P11, P12, M4, D2	Course and Fence Design	You are asked to produce a plan suitable for a Level 3/British Novice show jumping round: give details of all fence designs including heights and widths.	Plan to be produced with full details; this could be made with model jumps in a scaled down jumping arena or on graph paper (to scale).

## Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC Land-based sector suite. This unit has particular links with:

Level 2	Level 3
Introduction to Lungeing Horses	314.1 Contribute to the design and implementation of daily exercise programmes for horses 315.1 Ride horses for exercise 315.2 Ride and lead horses for exercise 316.1 Ride schooled horses to maintain training 316.2 Jump schooled horses to maintain training
Undertake Horse Handling	Riding and Exercising Horses
	Understand the Principles of and Plan and Monitor Horse Fitness and Training
	Undertake Equestrian Teaching
	Riding Horses on the Flat
	Riding Horses over Fences

## Essential resources

Learners will need supervised access to practical demonstrations or training sessions of horses working from the ground to gain evidence and relate the theory to a practical context. A required range of library material and internet access will be necessary so learners can carry out the required research. Videos or DVDs may also be required to give learners breadth of experience and observation.

## Employer engagement and vocational contexts

Centres are encouraged to create opportunities for learners to have practical experience whenever possible to help them link with the theory taught, for example learners accompany riders to walk jumping courses and view the course plans at competitions. Discussions, whenever possible, regarding training methods, which may not necessarily be used by the work placement, would be valuable for learners.

### Indicative reading for learners

#### Textbooks

British Horse Society – *The BHS Manual Of Equitation: The Training of Horse And Rider, Fourth Edition* (Kenilworth Press, 2006) ISBN 1872119336

Cave M – *The Course Companion for BHS Stage I* (J A Allen, 2000)  
ISBN 0851317650

Cave M – *The Course Companion for BHS Stages III and IV* (J A Allen, 1995)  
ISBN 0851316565

German National Equestrian Federation – *Advanced Techniques of Dressage* (Kenilworth Press, 2000)  
ISBN 1872119328

Harris C – *Fundamentals of Riding: Theory and Practice, Second Edition* (J A Allen, 1995) ISBN 0851316514

Holstein G – *Advanced Techniques of Riding: The Official Instruction Handbook of the German National Equestrian Foundation* (Half Halt Press, 1987) ISBN 0939481030

Kidd J – *Dressage Essentials* (Howell Books House Inc US, 1999) ISBN 1872082505

Klimke R – *Basic Training of the Young Horse, Second Edition* (J A Allen, 2006) ISBN 0851319270

Klimke R and Klimke I – *Cavelletti: The Schooling of Horse and Rider Over Ground Poles* (J A Allen, 2000)  
ISBN 1585741957

Loch S – *Invisible Riding: The Secret of Balance for You and Your Horse* (Horse and Rider Magazine, 2003)  
ISBN 0951370774

Loch S – *The Classical Seat: A Guide for the Everyday Rider* (Horse and Rider Magazine, 2003)  
ISBN 0951370766

Midkiff M – *Fitness, Performance and The Female Equestrian* (John Wiley & Sons, 1996) ISBN 0876059450

Moffett H – *Enlightened Equitation: Riding in True Harmony with Your Horse*  
(David & Charles Ltd, 2002) ISBN 0715315005

Paalman A – *Training Showjumpers, Second Edition* (J A Allen, 1998)  
ISBN 0851315488

Rawlins D and Ryecart K – *Dressage Masterclass with Dane Rawlins* (David Bateman, 1995)  
ISBN 0715302698

Stevens M – *A Classical Riding Notebook* (Kenilworth Press, 2006) ISBN 1872082505

#### e-media

Dressage Training Made Clear With Ulla Salzgeber Vol 1 and 2 DVD

Equitest – Interactive Dressage Prelim-Novice CD ROM

Loch S – The Classical Seat Series Vol 1 – 3 DVD

Stephen Clarke – Through the Judges Eye Vol 1 – DVD

## Magazines

*Eventing*

## Websites

[www.badminton-horse.co.uk](http://www.badminton-horse.co.uk)

[www.bhs.org.uk](http://www.bhs.org.uk)

[www.britishdressage.co.uk](http://www.britishdressage.co.uk)

[www.britisheventing.co.uk](http://www.britisheventing.co.uk)

[www.bsja.co.uk](http://www.bsja.co.uk)

[www.burghley-horse.co.uk](http://www.burghley-horse.co.uk)

[www.hickstead.co.uk](http://www.hickstead.co.uk)

Badminton Horse Trials

British Horse Society

British Dressage

British Eventing

British Show Jumping Association

Burghley Horse Trials

Hickstead

## Delivery of personal, learning and thinking skills (PLTS)

The following table identifies the PLTS opportunities that have been included within the assessment criteria of this unit:

Skill	When learners are ...
<b>Independent enquirers</b>	researching rules and regulations regarding riding in affiliated competitions
<b>Creative thinkers</b>	planning own training sessions and methods to improve horses
<b>Reflective learners</b>	reading information, analysing and discussing findings
<b>Team workers</b>	working in a busy equestrian environment cooperatively with others responding well in emergencies to help all others involved
<b>Self-managers</b>	planning schooling sessions, collating information and resources and planning own time with little input from tutor or peers
<b>Effective participators</b>	working effectively as part of a team

Although PLTS opportunities are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
<b>Independent enquirers</b>	researching methods of training horses and making judgements on good and poor practices
<b>Creative thinkers</b>	giving examples of training activities to improve a horse's way of going, taking account of the horse's wellbeing at all times
<b>Reflective learners</b>	reviewing own performance to self-evaluate and reflect on methods used, equipment and facilities and make suggestions to improve future sessions
<b>Team workers</b>	participating in all practical tasks in a busy training establishment
<b>Self-managers</b>	working with minimum supervision to the required standard
<b>Effective participators</b>	taking part in discussions, making suggestions and answering questions where relevant

## ● Functional Skills – Level 2

Skill	When learners are ...
<b>ICT – Use ICT systems</b>	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	working with computers, printers, laminators, data storage and interconnectivity where appropriate
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	selecting the most useful templates available on websites to produce lesson plans, schemes of work and enhance their presentations
Manage information storage to enable efficient retrieval	backing up, storing and titling using the various types of storage medium available eg CDs, DVDs, hard discs, memory sticks
Follow and understand the need for safety and security practices	understanding the need for anti-virus software and how to use it understanding the problems when file sharing
Troubleshoot	understanding 'help' menus understanding the various methods of data retrieval
<b>ICT – Find and select information</b>	
Select and use a variety of sources of information independently for a complex task	researching information ie rules and legislation regarding teaching riding
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	using IT systems to search for and evaluate the usefulness of searches
<b>ICT – Develop, present and communicate information</b>	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> <li>• text and tables</li> <li>• images</li> <li>• numbers</li> <li>• records</li> </ul>	recognising the different formats available for using different applications with a mind to file size and suitability for reproduction, printing and sending aware of programmes and their use and suitability of programmes for the required task. keeping records
Bring together information to suit content and purpose	retrieving their information
Present information in ways that are fit for purpose and audience	producing assignments, schemes of work, lesson plans etc to a high standard to suit the intended purpose for example handouts for presentations
Evaluate the selection and use of ICT tools and facilities used to present information	deciding what ICT tools to use for each task
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists	using suitable visual mathematical statistical representation when applicable interpreting a range of available information

Skill	When learners are ...
<b>Mathematics</b>	
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations	using mathematics as a tool in a wide range of situations as a reference to solving problems using number and, for example, with and without a calculator
Identify the situation or problem and the mathematical methods needed to tackle it	recognising relevant formulae and expressions, and the method required to solve the problem
Select and apply a range of skills to find solutions	using suitable visual mathematical statistical representation when applicable interpreting a variety of information available
Use appropriate checking procedures and evaluate their effectiveness at each stage	using standard procedures for checking results and comparing findings at each stage keeping accurate records of findings at each stage of a procedure
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	using suitable visual mathematical statistical representation when applicable. interpreting a range of available information
Draw conclusions and provide mathematical justifications	showing findings accurately and showing all workings
<b>English</b>	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	taking part in a variety of discussions with other learners using a variety of methods to make their own presentations listening to others speaking, including others giving presentations on a variety of subjects
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	interpreting information from a variety of sources to present their work and involve themselves in discussions about the information
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	writing up assignments and reports using information when giving presentations in PowerPoint or in supporting handouts.