



SELF-ASSESSMENT CHECKLIST

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
Lines	12-foot Line.	22-foot Line.	45-foot Line.	6-foot Line / 45-foot Line.
Tools	Carrot Stick, Savvy String, Basic Skills.	Carrot Stick, Savvy String.	Carrot Stick, Savvy String, Flag (plastic bag on Carrot Stick).	Neck Rope / Flank Rope, Long Reins, Carrot Stick, Savvy String, Flag.
Zones <i>Appropriate use of zones for directing and supporting aids; progressively advancing to more sensitive zones.</i>	Zones 1 & 2.	Zone 3.	Zones 4 & 5.	All Zones.
Overall	Safe	Confident	Skilled	Expert
Phases <i>1. Minimum, subtle. 2. Soft but more pronounced. 3. Firmer. 4. Firmest/Effective. Timing: Long phase 1; Hands that close slowly and open quickly.</i>	Phase 1 – 4 as needed. Attitude of Justice. Hands that close slowly and open quickly. Timing of release to appropriate response. Steady use of phases, not too quick. Calm horse. PROMISE.	Phase 1 – 3. Long Phase 1, quick 2, 3. Effective Phase 4 should rarely be necessary. Use of expression, body language. Confident horse, no fear, no defensiveness. TELL.	Phase 1 – 2. Subtle communication and direction. Attentive, responsive horse, positive expression. ASK.	Phase 1 – 2. Elegant, subtle communication and direction. Expressive horse. SUGGEST.

On Line PATTERNS	LEVEL 1 (medium short range)	LEVEL 2 (medium long range)	LEVEL 3 (long range)	LEVEL 4 (long range/long reins)
Touch It	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Figure-8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weave		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Circles		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push a Ball		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obstacles		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Friendly

Horse is confident and relaxed. No tension.

- Rub horse all over with Carrot Stick (hind legs optional).
- Toss rope/Carrot Stick and String over neck and back 6 times, horse relaxed (no tension) and standing still.
- Massage front legs.
- Haltering with Savvy.

- Rub hind legs with Carrot Stick.
- Stand in Z3 and toss rope over head and back, front legs, hind legs, helicopter.
- Flapping rain coat.
- Umbrella opening and closing.
- Cross tarp.
- Front feet on pedestal.
- Scratch itchy spots around udder, sheath.
- Ball-move and bounce, while walking away.
- Massage tail.

- Extreme Helicopter.
- Slap ground 6 times hard with Carrot Stick and String.
- Rub and shake flag (plastic bag on Carrot Stick).
- Stand on pedestal.
- Hind feet on pedestal.
- Massage with clippers.
- Toothpick on neck, turns neck to you, softens (needle simulation).
- Massage inside ear (not deep!).
- Ball on horse.

- Swing rope or Carrot Stick and String overhead (Extreme Helicopter) standing in Zone 5.
- Play Friendly Game in Zone 1 from Zone 5.
- One foot on an object.
- Bounce ball on horse.
- Slap ground 6 times with Carrot Stick from Zone 5.

Porcupine

Appropriate response to feel or pressure, no fear, no resistance/opposition reflex.

- Move hindquarters full circle, both sides.
- Move forequarters full circle, both sides.
- Back up from nose (Zone 1) and chest (Zone 2).
- Lower head.

- Move sideways (keep your feet still).
- Lift and lead by front leg.
- Teach horse to stand on 3 legs (hold each leg up for 30 seconds).
- Pick up four feet from one side.
- Lift tail.

- Lead backwards by tail.
- Lead backwards by hind leg.
- Lead by ear.
- Lead by chin.
- Hold tongue.
- Lead by mane.

- Lead backwards by tail using just a few hairs (min. 10 steps).

Driving

Appropriate response to suggestion without touching. Line is used as safety net, has slack in it most of the time. Equalize Drive and Draw.

- Point A to Point B, 12-foot Line, Zone 2.
- Draw towards you, flowing hands on rope.
- Backwards from chest.

- Point A to Point B, 22-foot Line.
- Stick to Me at walk and trot, Zone 2.
- HQ & FQ yield 360°.
- Tap to lift feet.

- Point A to Point B, 45-foot Line.
- Stick to Me- move over, slow and fast
- Drive from Zone 5: one rein.

- Long reins- walk, trot, canter, turn, back up.
- Stick to Me- simple lead changes (mirror me).

YoYo

Forwards and backwards are equalized, away and towards and in transitions between gaits, and building to 'collection'.

- Back and forwards through gate.
- Walk, back up (keep horse out of personal space, teach to stop and yield).

- Up and down hills.
- Over pole.
- Back and forth from Zone 3.
- Back into/out of stall.

- Back and draw towards you (45-foot Line).
- Jump towards you, stop, back to obstacle.
- One hind leg or front leg over a pole.

- Long reins- transitions between gaits.
- Select leads at canter.

Circling

Demonstrate 'responsibility,' keep feet still unless doing Traveling Circles.

Not required.

- 4 – 6 laps, trot, canter.
- 2 – 4 laps maintaining gait at walk and trot.
- Change direction at trot.
- Traveling circles.
- Obstacles and maintain gait.
- Log / barrels - look where you are going.

- 6 – 10 laps at canter.
- 2 – 4 laps maintaining gait at trot and canter.
- Walk, trot, canter transitions.
- Simple change of direction at canter.
- 'S' patterns.
- Falling Leaf.
- Obstacles, hills, maintain gait.

- 10 - 20 laps, all gaits.
- Flying change of direction at canter.
- Flank Rope, 12-foot Line
- Back up 1-2 laps, 12-foot Line.
- Decreasing and increasing circles.
- Spin and go.

Sideways

Moving the horse laterally, sideways has many forms: sidepass, isolations (haunches in, shoulder in), and flexions (half pass).

- Slow with a fence, both ways.

- Medium speed.
- Sideways over a pole or log.
- Sideways to fence (for mounting).
- Sideways without fence.

- Fast (on 22 or 45-foot Line).
- Sideways towards you slow.
- Sideways over a barrel or log.
- Along log or fence, (keep your feet still).

- Half pass.
- Sideways towards you medium to fast.
- Sideways over barrel or log, yield away and toward.

Squeeze

Teach horses to overcome claustrophobic nature, gain confidence in small spaces. Learn Squeeze Pattern.

- Through 4 foot gap.
- Sniff the trailer.

- Jumps to 2 foot 6 inches (barrels).
- Through 3 foot gap.
- Zone 3 next to trailer.

- Jumps to 3 feet, multiple obstacles.
- Trailer load.
- Trailer load from fender.
- Forwards under a low hanging tarp.
- One foot on a pole.

- Jump upright barrels or double down barrels (according to ability of horse).
- Trailer load from the rear tire.
- Backwards under tarp.
- Stop half way over log