Trainer Guide

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INTRODUCTION

This trainer guide has been designed to support you as you train and support learners and sign-off the skills record for Unit 2: Stage 4 Senior Management.

Your role as a trainer is to ensure learners are competent with all criteria in the syllabus. Your training should cover the complete specification. Learners should also be encouraged to self-study, practice and gain work experience to be able to draw down answers from their own experiences. You also have responsibility to complete the learner's **Ready for Assessment** and **Trainer Endorsement** forms within the learner's skills record. You and the learner should ensure sufficient time to complete these before the learner's assessment. We strongly recommend the learner's skills record is completed before the learner books their assessment. The learner should have their own skills record for you to sign. If you would like a skills record for your own reference, a copy can be downloaded for free from our website (https://pathways.bhs.org.uk/resource-hub/skills-record/), or you can purchase a hard-copy for £5 by calling the Education Team. We recommend that you keep a record of learners that you have signed off and the applicable date for your own records.

LEARNERS ARE REQUIRED TO TAKE THEIR COMPLETED SKILLS RECORD TO THEIR ASSESSMENT.
Failure to do so may result with the learner not being able to sit the assessment.

In order to sign-off the skills record at this level, you need to:
- Be an Accredited Professional Coach or Accredited Professional Centre Coach,
- Have achieved the BHS Stable Managers qualification, or Performance Business Management, or Equestrian Tourism Centre Manager
- Have a teaching or coaching qualification, or Ride Leader Level 2,
- Have a thorough knowledge of the revised assessment process (preferably having completed a conference call to confirm standards and procedure).

You will need to be able to:
- Recognise when the learner is working at Stage 4 level
- Have a thorough knowledge of the breadth and depth of the current Stage 4 Senior Management assessment criteria
- Understand the expectations of industry requirements
- Differentiate between skills record sign-off requirements
    - Ready for assessment - the learner is sufficiently of the level to be presented for assessment (these learning outcomes are shaded grey in this guide)
    - Trainer endorsement - the criteria is required to be signed off by the trainer prior to the assessment day. On the assessment day the learner will be required to undertake a viva (verbal check of knowledge) with the assessor selecting criteria at random to confirm thorough understanding.
- Understand the differences in the relevant command verbs as part of the assessment criteria.

COMPLETING THE SKILLS RECORD
If you meet the above criteria you can sign off the learner's skills record. With either a **Ready for Assessment** or **Trainer Endorsement**, these can be signed off in stages on a continuous basis. Within the **Trainer Endorsement** forms you will note the 'date achieved' for each learning outcome within

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the form, and also add any feedback for the learner should you wish.

COMMAND VERBS

Below is a list of the commonly used command verbs used throughout the Stage 4 units, and their meaning.

Verb	The learner will be able to:
Analyse	Break down a complex topic into simpler parts, exploring patterns and explaining significance. Could be strengths, weaknesses, conclusions and often paired with making recommendations.
Assess	Consider several options or arguments and weigh them up to come to a conclusion about their effectiveness or validity. Similar to evaluate, though can be without the measure.
Compare	Identify similarities and differences of the topic.
Demonstrate	Carry out particular activity or skill showing awareness and understanding.
Describe	Paint a picture in words. Give a full description including details of all the relevant features.
Evaluate	Examine the strengths and weaknesses and judge the merits of particular perspectives to come to a conclusion about their success/importance/worth. Evaluation is often against a measure or value.
Explain	Give logical reasons to support a view.
Justify	Give reasons why something is valid. This might reasonably involve discussing and discounting some views or actions. Each view or option will have positives and negatives, but the positives should outweigh the negatives.

TOTAL QUALIFICATION TIME (TQT)

The BHS specifies a total number of hours that it is estimated an average learner will take to complete a qualification: this is the Total Qualification Time (TQT). Within TQT, the BHS identifies the number of Guided Learning Hours (GLH) that we estimate a trainer might provide. Guided learning means activities such as lessons, tutorials, online instruction, supervised study and giving feedback on performance. Guided learning includes the time required for learners to complete assessment. In addition to guided learning, other suggested learning will include private study and preparation for assessment such as preparatory reading, revision and independent research. The thoroughness of their training, which should consist of considerable experience backed up by knowledge, is a vital aspect.

BHS Stage 4 qualifications have been designed around the number of hours of guided learning expected for the average learner (eg, at Stage 3 level working towards Stage 4). It is important to note that this is a guide. Each learner you train will have a different level of experience and learn at a different pace and may need more or less of the GLH advised.

GLH and suggested learning hours is indicated for each learning outcome within this guide. The TQT will vary depending on the combination of units required for each of the qualifications available within the Stage 4 career pathways.

STAGE 4 QUALIFICATION STRUCTURE

There are several career pathways to follow within the Stage 4 suite of qualifications.

The qualifications within the suite are:
- Stage 4 Senior Yard Manager
- Stage 4 Senior Yard Manager with Riding
- Stage 4 Senior Eventing Coach
- Stage 4 Senior Dressage Coach

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- Stage 4 Senior Show Jumping Coach

Each qualification comprises of a combination of compulsory and optional units.

This table shows an overview of the qualifications at Stage 4 and the units required for the achievement of each qualification.

C - Compulsory units O - Optional units	STAGE 4 SENIOR YARD MANAGER	STAGE 4 SENIOR YARD MANAGER WITH RIDING*	STAGE 4 SENIOR EVENTING COACH**	STAGE 4 SENIOR DRESSAGE COACH **	STAGE 4 SENIOR SHOW JUMPING COACH**
Unit 1. Stage 4 Senior Care	C	C	C	C	C
Unit 2. Stage 4 Senior Management	C	C	C	C	C
Unit 3. Stage 4 Senior Lunge		C	C	C	C
Unit 4. Stage 4 Senior Ride for Training Eventing		O	O	O	O
Unit 5. Stage 4 Senior Ride for Training Dressage		O	O	O	
Unit 6. Stage 4 Senior Ride for Training Show Jumping		O	O		O
Unit 7. Stage 4 Senior Coaching Eventing			C		
Unit 8. Stage 4 Senior Coaching Dressage				C	
Unit 9. Stage 4 Senior Coaching Show Jumping					C

* Achievement of the Stage 4 Senior Yard Manager with Riding requires completion of the three compulsory units and one optional unit.

** Achievement of Stage 4 Senior Coach qualifications require completion of the four compulsory units and one optional unit

GENERAL GUIDANCE

The information, guidance and example answers given in the text below relate to UK law, legislation and best practice. If the learner is sitting the assessment in countries outside of the UK, they should be able to fulfill the assessment criteria in relation to that country's laws and legislation.

CASE STUDY INFORMATION

At the Stage 4 Senior Management assessment, learners will be asked questions in relation to a case study to fulfil the assessment criteria for:

- Learning Outcome 6 - Understand financial requirements for an equestrian business
- Learning Outcome 8 - Understand different marketing opportunities.

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The case study will be given to the learner on the assessment day. An example of the type of case study that will be provided is given below. **Please note** this is an example and this case study will not be used on the assessment day.

> Moorland Riding Centre
>
> Moorland Riding Centre is trekking centre based next to a National Park. The majority of its business is seasonal. The centre provides hacking and trekking including longer day rides. Business is busiest from March to October. All treks and hacks are charged at the same hourly rate and prices have not been reviewed for some time. The centre currently does not provide any lessons although one of the permanent staff members holds a coaching qualification.
>
> The centre has a website and advertises online with its main focus on attracting business over the summer. The centre would like to expand their business to offer lessons and hacks for local clients and have been approached by a local school to provide lessons offered as part of an afterschool activity scheme. The business is situated next to a property that has a number of holiday cottages. They have been approached by the owners of the neighbouring property who wish to form a partnership in order to provide riding holidays.
>
> The business has two full time staff members and takes on a further two full time staff members and two part time staff members from March to October.

Learners will be given an additional case study and asked questions to fulfil:

- Learning Outcome 10 – Understand how to manage grassland.

An example of the type of case study that will be provided is given below. **Please note** this is an example and this case study will not be used on the assessment day.

> New livery yard
>
> You have purchased a property with land, you intend to set up a livery business. You have 10 acres, some of the land has previously been grazed by sheep. It is now December, you would like to start to advertise for livery clients and have livery services available by March.

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LO 1. Understand the importance of customer care
(Trainer Endorsement)
GLH 4; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
- ***Ensure the 'Trainer Endorsement' form in the learner's skills record is completed before the assessment day; this records that an assessment with the trainer has taken place***
- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
1.1 **Compare** different booking methods for equestrian businesses	The learner should be able to **compare** different types of booking methods and consider how they will work successfully in different environments. Training/practise should include the learner taking and processing bookings wherever possible. Booking methods: • Computer systems • Paper based **Example depth and level of knowledge** Most centres find that telephone bookings are the preferred method of arranging lessons. Some encourage email requests followed by confirmation from the centre. Some centres share a 'grading' system on their website that helps potential clients to self-assess their level and ability prior to their first lesson, and most yards will insist on an assessment lesson in the first instance (advised by most insurance underwriters for riding school public liability). Most centres will require at least 24 hours' notice for cancellations or will impose a cancellation fee that varies from 50% to the full amount of the cost of the lesson. It is often possible to make block bookings at a reduced rate, although these may carry different cancellation rules. Riders will normally be allocated with an appropriate horse, although at many yards clients may request a particular horse in advance. Larger centres may have an online booking form for lessons, although this is quite difficult to manage as there needs to be a facility to be inbuilt to the booking form to prevent too many people of a similar height and weight booking onto the same lesson, or overbooking the horses and facilities. Rider record forms should be completed and kept updated, as these may need to be used in the event of defending a centre against a spurious claim for negligence/injury.
1.2 **Justify** the allocation of resources in a range of situations	The learner needs to justify the allocation of resources at certain times/seasons and to give reasons for the points they make. Resources and situations should include: • Riding lessons horse to client, work loads • Arenas – peak times and consider alternative uses for off peak (dog training/ car boot sales etc) • Staff workloads - especially late nights or weekend working on fair rotas • Allocation of horses/coaches • Balancing liveries use and riding school clients

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	Example depth and level of knowledge
	Riding lessons horse to client
	Rider height and weight will be an integral factor to consider when allocating horses to riders. The policy of the BHS regarding rider weight:
	No horse should be asked to carry more weight than it is comfortably able. Failure to adhere to this is a breach of welfare and may cause long term physiological damage to the animal.
	Most centres will have a suitable horse for almost everyone that is within a healthy weight range for their height. However the particular horse must be chosen carefully to reflect the rider's ability and riders must accept that there are some horses that are not sufficiently robust to carry them safely. It is important to remember the horse wears tack when ridden so this additional weight also has to be considered.
	Whilst considering how much weight a horse can carry, the ideal bodyweight of the horse needs to be considered in conjunction with the actual bodyweight of the horse. A horse that is significantly overweight will not be sufficiently fit to carry additional weight. A horse that is significantly underweight should not be ridden.
	Young horses are slower to develop sufficient balance and musculature and cold-blooded breeds (such as the Irish Draught) will tend to mature more slowly than warm and hot-blooded breeds such as the Thoroughbred. Elderly horses may also struggle to carry as much weight as younger horses of a similar size due to the effects of age and wear and tear on the body. The age at which a horse should be considered as elderly will vary with the fitness of the horse in question.
	Certain breeds of horse have been bred specifically to carry weight. The Highland Pony, as an example, was in part developed in order to transport heavy deer carcasses at a slow and steady pace. It would be therefore realistic to expect horses of this type to carry a bit more weight assuming that there are no confounding factors and the horse is working at a slow pace.
	The conformation of a horse's back is particularly important in determining the maximum weight it can carry. Irregularities in the shape of the spine such as sway backs and pronounced withers (particularly common in older horses) mechanically weaken the spine and limit weight carrying capacity.
	A beginner or novice rider is unlikely to have developed sufficient balance and skill to prevent them from moving around in the saddle. This will have a negative impact on the horse's spine.
1.3 **Explain** factors that contribute to successful customer care	The learner should be able to **explain** the following factors that contribute to successful customer care: • 'Shop front' process - outward facing customer care • Helpful language • Time to help • Making the client feel important • How to handle challenging and emergency situations • Maintaining the need for confidentiality and client contact **Example depth and level of knowledge** **Outward facing customer care:**

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	Successful customer care will ultimately result in; acquiring new clients, providing satisfaction, and building loyalty.
	Priorities are: 1. The overall quality of the goods/service 2. The friendliness of the staff dealing with them 3. The efficiency with which problems/issues are dealt with 4. The speed of service/delivery of the goods/service in comparison to competitors 5. The helpfulness of staff in general 6. The effectiveness with which enquiries were handled, in particular the initial contact 7. The extent to which the customer felt they were valued 8. The competence of staff in completing their tasks 9. The ease with which the transaction was conducted 10. The extent to which the customer was kept informed of developments
1.4 **Compare** membership schemes and opportunities for clients	The learner should be able to **compare** the different schemes available to both clients and be able to offer reasons as to why each one may suit different individuals. Membership schemes may include: • BHS membership options • Discipline – Member Bodies • Pony Club • Other **Example depth and level of knowledge** **BHS membership** BHS membership has two main strands; Gold and Silver. Gold membership is suited to those that own/loan or ride horses (ride horses other than those at a riding school), as it provides the member with Public Liability and Personal Accident insurance. If the client does not own or loan their own horse, or ride other people's horses', then BHS Silver membership would be of benefit to them. Both memberships will support the charity and help the Society achieve its charitable aims across safety, access, welfare and education. Anyone that cares about horses will have an interest in the work the BHS does. Both membership options will also give the member the British Horse magazine, and will give them access to the Challenge Awards; a series of awards suited to recreational riders and owners that cover horse care, welfare, stable management and riding topics. It would be of benefit to the riding centre or coach to be able to offer the Challenge Awards as another income stream for the coach and to help motivate and retain clients. If the client wants to work in the equine industry then Gold membership should be recommended as this gives the member access to sit the BHS career pathways qualifications.

LO2. Be able to use interpersonal skills
(Ready for Assessment)
GLH 4; Self-guided study 6

- *This learning outcome is assessed on the assessment day*
- *The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below*
- ***Ensure the 'Ready for Assessment' form in the learner's skills record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.***

This learning outcome will be assessed via an informal debate/discussion within a small group. The assessor will introduce a topic for the group to discuss. The learner will have an opportunity to give an overview of their points (this could be for or against the topic or idea given) and listen to other ideas presented within the group. The aim of the debate/discussion is not to assess the learner's ideas or arguments (there will not be a right or wrong answer), but the assessors will be looking for considerate and respectful communication and listening skills as per the assessment criteria below. The topics for discussion will be listed on the website.

Assessment criteria	Guidance on level and depth of subject content
2.1 **Evaluate** own interpersonal skills	Learner should be able to evaluate their interpersonal skills, to include: • Setting realistic objectives, priorities and standards • Reflect on own learning and progress • Use of both verbal and non-verbal forms of communication • Listening as an aid to meaningful communication, a two-way process Method of assessment: Discussion.
2.2 **Demonstrate** effective verbal communication in a range of situations	Verbal communication to include tone and volume of voice. Situations may include: • Communication between different individuals and groups e.g. co-workers, managers, junior staff, employees, customers, clients, visiting coaches/trainers, speakers • Different contexts including training sessions, presentations, group meetings, performance appraisals, one-on-one discussions, interviews, disciplinary sessions During discussions on the assessment day, the learner should demonstrate effective communication skills to assessors and fellow candidates during group discussions. Method of assessment: Observation and **Trainer/Employer Endorsement**. For assessment criteria 2.2 and 2.3, the trainer or employer can sign off the **Trainer Endorsement** within the Skills Record. The range of contexts cannot be assessed during the assessment day, so the trainer or employer must observe the learner in a range of these situations and sign off the skills record to confirm competency.
2.3 **Demonstrate** effective non-verbal communication	Non-verbal communication to include: • Gestures displayed through body language and physical distance between the communicators • Body Movements - e.g. hand gestures, nodding or shaking the head • Posture - how you stand or sit, whether your arms are crossed • Eye contact • Closeness or personal space • Facial expressions (smiling, frowning, blinking)

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	Situations may include:
	- Communication between different individuals and groups e.g. co-workers, managers, junior staff, employees, customers, clients, visiting coaches/trainers, speakers. - Different contexts including training sessions, presentations, group meetings, performance appraisals, one-on-one discussions, interviews, disciplinary sessions Method of assessment: Observation and **Trainer/Employer Endorsement**. For assessment criteria 2.2 and 2.3, the trainer or employer can sign off the **Trainer Endorsement** within the Skills Record. The range of contexts cannot be assessed during the assessment day, so the trainer or employer must observe the learner in a range of these situations and sign off the skills record to confirm competency.
2.4 **Demonstrate** effective listening skills	Learner should be able to **demonstrate** effective listening skills when communicating with assessors and candidates. Listening skills may include: - Informational Listening (listening to learn) - Critical Listening (listening to evaluate and analyse) - Empathetic Listening (Listening to understand feeling and emotion), with consideration and awareness of mental health Informational Listening (listening to learn) Method of assessment: Observation.
2.5 **Demonstrate** effective negotiation skills.	Learner should be able to **demonstrate** effective negotiation skills when communicating with candidates during group discussions. Negotiation skills - Listening actively to the other party - involving the ability to read body language as well as verbal communication. - Respond appropriately - Ability to influence others - Ability to compromise Some of the key skills for successful negotiation are: Preparation: It is important to ensure that you have all the information that you can before you start and to be fully prepared for any eventuality. Patience: It is useful to try to focus on the positive points of view before you go on to settle any other issues. Active listening: It is essential to listen to the other party to find areas for compromise during the meeting. Emotional control: Sometimes sensitive issues can be frustrating, and allowing emotions to take control can often lead to negative results. Verbal communication: Skilled negotiators must be able to communicate clearly and efficiently to the other party during the negotiation. If you do not state your case clearly, it can lead to misunderstanding and the possibility of an unfavourable result. Problem-solving: Instead of concentrating on the end goal for the negotiation, it may be better to focus on problem-solving so you don't have a breakdown in communication. Ethics and reliability: Both parties must trust that the other side will follow through with any promises and agreements. Method of assessment: Observation.
2.6	Learner should be able to **demonstrate** effective decision making skills when

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Demonstrate effective decision making skills	communicating with candidates during group discussions. May include: • Goals - working to achieve set objectives • Problem solving • Learning to make correct choices from seeing, listening and doing Method of assessment: Observation.

The following matrix is a guide as to how the discussion will be assessed.

Skills	Proficient	Unsatisfactory
2.2 Verbal communication skills	Communicated clearly; good voice and delivery rate.	Failed to communicate clearly; no eye contact; monotone delivery.
2.3 Non-verbal communication skills	Positive eye contact and good demeanour shown i.e. good posture, proper gestures and warm expressions.	Poor eye contact. Body language inappropriate, including bad posture, inappropriate gestures and expressions.
2.4 Listening skills	Remained focused on person speaking. Allowed others to complete what they were saying without interruption unless where justified. Responses were appropriate and showed comprehension of others' arguments/points.	Easily distracted, lacked focus. Showed little awareness of others. Little or no response to others, with little comprehension of others' arguments/points. Interrupted others unnecessarily/inappropriately.
2.5 Negotiation	Arguments were logical and convincing. Addressed most of opponent's arguments with counter evidence. Showed some influence over others and ability to compromise	Few arguments were logical and convincing. Did not address opponent's arguments. Did not influence others and showed little evidence of compromise
2.6 Decision making	Developed conclusion based on points made throughout discussion. Showed some adjustment of view based on input from others	No viable conclusion made.
General overview	Proactive throughout, showing good balance between listening and initiating. Used a range of discussion skills to keep discussion going. Tried to involve everyone in the group. Understood the purpose of discussion and kept the discussion focused and on topic.	Lacked participation, resulting in little evidence with which to assess skills. Limited discussion skills, contributions did not focus on the topic and tended to support other views without adding further to points made.

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LO 3. Be able to manage staff
(Trainer Endorsement)
GLH 4; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
- ***Ensure the 'Trainer Endorsement' form in the learner's skills record is completed before the assessment day; this records that an assessment with the trainer has taken place***
- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
3.1 **Explain** different ways of employing staff	The learner should be able to **explain** logical reasons for why staff may be employed in different contexts. Contracts of employed should be discussed and the content, including social media clauses. Ways of employing staff include: • Sub-contractors • Part time/ full time/ volunteers • Visiting lecturers • Zero hours • Apprentices • Self-employed **Example level and depth of knowledge** **Self-employed:** Self-employed people effectively run their own business – they may, for example, be an independent riding coach or someone who specialises in backing and bringing on young horses on their own private land. In some contexts, they may 'double' as an independent contractor to a business – for example a self-employed electrician who comes to fix some wiring problem at a yard. Self-employed people are not paid through PAYE and don't have the same employment rights as employees for example no sick pay or holiday. They are responsible for paying their own National Insurance and Tax. A self-employed person usually agrees a price for the work and an invoice is submitted for payment at the end of the work.
3.2 **Explain** the purpose and process of appraisals and staff development	The learner is expected to **explain** the purpose and process of staff development, to include: • Use of appraisals • Criteria for assessment • Performance review • Action plans • CPD • Dealing with concerns, for example grievance, disciplinary **Example level and depth of knowledge** **Appraisals:** Appraisals, or performance reviews, is an opportunity for team members to discuss their performance, development needs and aspirations with a manager or company

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	representative. Both team member and appraiser should provide examples of good performance and development requirements so that performance and job satisfaction can be enhanced.
	Performance should be monitored and discussed continually throughout the year via one to ones, but a more formal method of recording development and performance should be carried out via the appraisal process. This process may vary between organisations, but, for example, January is when objectives and targets can be set for the year ahead. A mid-year review should be conducted in June to review the progress of the targets and put measures in place if there are concerns for the team member not meeting expectations. December is when the year is reviewed and achievement is recorded against the objectives set. Objectives are discussed for the following year, and then the cycle begins again in January. An appraisal should be a development opportunity for the team member and should be a chance for two-way conversations to occur. The appraiser should not use the appraisal as a way to bring up concerns/performance that has not already been discussed in continual one to ones; nothing should come as a shock to the team member during an appraisal. An appraisal is also an opportunity for the team member to discuss development opportunities and how they would like to progress within the organisation.
3.3 Produce training plans to develop staff	The learner should have experience in producing training plans to develop staff, that identify: • Target setting • Identifying training needs against job role • Short (one month), medium (six months) and long term (one year) aims The learner should have had experience with setting training plans for staff and should be able to explain how they identified the goals set in conjunction with the member of staff, and how they measure progress.

LO4. Understand requirements for self-employment
(Trainer Endorsement)
GLH 3; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
- ***Ensure the 'Trainer Endorsement' form in the learner's skills record is completed before the assessment day; this records that an assessment with the trainer has taken place***
- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
4.1 **Explain** the specific requirements of a self-employed coach	The learner should be able to **explain** the requirements of a self-employed coach, to include: • Insurance • Employee • Vehicles • Riding school license if using your own horses

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	• Planning permission if on your own premises • Health and safety **Example level and depth of knowledge** **Insurance:** Public Liability insurance protects the coach if a member of the public comes to harm or has their property damaged due to something careless the coach has done. Public Liability insurance is one of the benefits with APC membership, although this can also be sourced independently. The insurance should cover you whilst undertaking duties as a coach/groom etc. Insurance can be paid in monthly instalments or an annual sum. Public liability insurance for self-employed coaches is not required by law, but is strongly recommended to protect the coach if any legal action were to be taken. Self-employed coaches should also consider taking out personal accident insurance. This is especially important if they ride as part of work. If a coach were to become injured and unable to work this would provide some income until they recover.
4.2 **Compare** the benefits of different membership schemes for self-employed coaches	The learner should be able to **compare** the different membership schemes that will support self-employed coaches. Schemes may include: • Accredited Professional Coach • Discipline – Member Bodies • British Grooms Association • Other **Example level and depth of knowledge** **APC membership:** Accredited Professional Coach membership is offered by the BHS for coaches qualified to Stage 3 Coach, or equivalent. The requirements for joining and remaining a current APC are: • BHS Stage 3 Coach qualified, or equivalent • Public Liability insurance • Current first aid at work or equine specific first aid qualification • Current safeguarding and protecting children workshop attendance • DBS check • Current attendance at an approved CPD event • Agreement to adhere to the coaches Code of Conduct The benefits of joining as an APC are: • BHS First Aid and Safeguarding courses included with duration of membership • BHS Gold membership • Option to take out Public Liability including Grooms insurance and care, custody and control and Personal Accident insurance • Access to over 200 lesson plans and other resources • Access to an exclusive professional online community • Access to discounted CPD events in partnership with BEF member bodies • Free APC jacket (first year only) • Access to deliver the Challenge Awards, become an Accredited Ride Safe Trainer, Accredited Riding Out Trainer and Accredited Stage 4 Trainer • Discounted BHS assessment fees APC membership can be paid via annual or monthly direct debit, or annual credit or debit card payment. Some of the benefits above relate to membership in the UK only.

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| 4.3 **Explain** the benefits of Continued Professional Development for a freelance coach | The learner should be able to **explain** the benefits of Continued Professional Development, to include:
• Assessing own performance
• Performance review
• Target setting
• Identifying need against job role

Example level and depth of answer:
CPD helps keep knowledge and skills up-to-date. It ensures that the professional standard of qualifications and registrations is maintained. It contributes to their professional sense of direction. Builds confidence and credibility, allows a coach to showcase their achievements and equips them with tools to cope positively with change.
CPD requirements should be identified via feedback from clients, mentors and self-evaluation. Each year, the coach should review their coaching skills and try to source CPD that will help to address any areas for development. CPD should be sourced to develop the coach and not just go for the event that is the closest/cheapest or most convenient.
CPD should aim to; deliver information, teach/learn a new skill or instil a change in behaviour. The most successful type of CPD is when the coach can get involved as this helps to learn the underpinning knowledge that may come with learning a new skill. CPD themes may include:
• Topics that support the rider (for example, mental or physical development, biomechanics or technical or tactical support)
• Topics that support the horse (for example, fitness and training, care and management, behaviour and handling, tack and equipment, anatomy and physiology)
• Topics that develop interpersonal skills (for example, leadership, building rapport, communication and engagement, coaching skills)
• Topics that develop intrapersonal skills (for example, self-awareness, planning and emotional intelligence)

The coach should vary the CPD they attend to try to cover different themes on a regular basis, and not limit themselves to their 'comfort zone'.

The regularity of CPD will depend on if the coach is accredited to any professional body, for example, BHS APC membership requires annual CPD of at least 6 hours in total.

CPD can also be gained from shadowing a more experienced coach, working with dressage judges or show jumping course builders, cross country course walks or professional discussions. CPD can also be sourced from non-equestrian events, for example UK Coaching host many workshops that will have coaches attend from many different disciplines that will allow good practice to be shared from multiple sports. CPD is a way for freelance coaches to network with other coaches, which is important as a freelance coach may work in isolation. |

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LO5. Understand the roles and responsibilities of a yard manager

(Trainer Endorsement)
GLH 4; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
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- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
5.1 **Explain** the requirements of implementing relevant legislation	The learner should be able to **explain** the requirements of relevant legislation, to include: • Animal Welfare license • Planning permission regulations for business use • Stable yard risk assessment • Fire risk assessment requirements • GDPR • RIDDOR • COSHH • Safeguarding • Equality and Diversity **Example level and depth of answer** **Animal Welfare License:** All businesses that hire out horses for riding or for riding lessons are required by law to possess the Animal Welfare (Licensing of Activities Involving Animals) (England) Regulations 2018 current licence. This includes riding schools and those that hire out horses for trekking, loan horses, hire hunters, offer polo/polocrosse instruction and run pony parties (but only where the ponies are ridden) and offer pony and donkey rides. In order to receive a licence a business will need to meet all of the minimum standards set out in the Defra document. The person who holds the licence must possess an appropriate formal qualification, or have sufficient demonstrable experience in the management of horses, as well as holding a valid certificate of public liability insurance, which must also be displayed. The running of the business must never be left in the charge of anyone who is under 18 years old and no horses should be hired out except under the supervision of a person aged 16 years or more, unless the licence holder is satisfied that the person hiring the horse is competent to ride without supervision. All records must be available for inspection by an inspector and kept for at least 3 years, beginning with the date on which the record was created.
5.2 **Explain** the purpose of different types	The learner is required to explain the purpose of types of insurance, such as: • Public liability • Employers liability

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of insurance	• Horse insurance • Vehicles and buildings
	Example level and depth of answer **Employers Liability insurance:** It is a legal requirement of the Employers' Liability (Compulsory Insurance) Act 1969 for any employer to have this insurance, whether their staff and helpers are paid or not. However, there is not a legal requirement for employers' liability insurance for people who work as self-employed contractors on a yard unless they are using your equipment. If they do, then you are still responsible for their health whilst in the workplace. An employer has a legal responsibility to protect the health and safety of their employees. For example, a risk assessment that is suitable and sufficient must be in place, and all reasonably practicable measures to protect employees must be taken. The minimum legal amount of employers' liability cover is £5 million but individual risks and liabilities should be considered and this sum may be increased. The Health and Safety Executive (HSE) enforces the law on employers' liability insurance and HSE inspectors can check that there is an employers' liability insurance in place with an approved insurer for at least £5 million. There is a fine of up to £2,500 for any day without suitable cover in place. The type and amount of cover required for a premises will depend on its individual characteristics, but it always make sense to check the details of any cover and consult the company on any finer points.

LO 6. Understand financial requirements for an equestrian business
(Ready for Assessment)
GLH 6; Self-guided study 3

- *This learning outcome is assessed on the assessment day*
- *The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below*
- ***Ensure the 'Ready for Assessment' form in the learner's skills record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.***

Assessment criteria	Guidance on level and depth of subject content
6.1 **Explain** pricing methods	The learner should be able to identify several pricing options and **explain** the importance of each, to include: • Different pricing structures • Peak/off peak • Pricing of services such as liveries, facility ire, competition • Special rates • Importance of overheads

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	Example level and depth of answer **Pricing structures:** Many yards will start their pricing strategy at what they consider to be the 'going rate' for their various services. Different pricing structures will be driven by local demand and the level of service provided, but in most commercial riding schools there will be a differential for the length of the lesson, type of lesson, the level of the coach, whether it is a group/private or semi-private lesson, and the time of day or day of the week that it takes place (peak or off peak). Some yards have discounts for regular customers who 'block book' in advance, or pay by standing order, and others offer concessionary rates for particular groups such as Riding for the Disabled. Method of assessment: Discussion

6.2 **Explain** a range of methods of payment	The learner should be able to explain the various methods of payment to include:
	   • Debit and credit cards
	   • Cash
	   • Cheque
	   • BACs
	   • On-line payment
	   • Recording payment
	   • Advance payments
	   • Cancellation policies
	
	Example level and depth of answer
	Debit and credit cards:
	Credit and debit cards are widely used and a popular method of payment. This payment method requires the business to have a device to be able to take the payment, this could be a web portal or a hand-held terminal. Either of these options will require a subscription to a provider to process the transactions. This will be a cost to the business which is usually a percentage of the transaction amount. They may also require a fixed annual hire fee for the use of the device. These costs should be factored before deciding if credit or debit card payments should be taken, although this should be weighed up against customer ease and preference too.
	Credit or debit card payments can either be taken via phone, online or face to face. If taking payments via phone or face to face it is good practice to enter these details to the device at the time of taking payment to avoid these details being written down. Another advantage of taking the payment at the time of the booking is that if the payment fails you can resolve it with the customer there and then.
	If taking payments online it is essential your website is secure and has the necessary processes in place to prevent information accessed by hackers. Again, there will be a cost for this service to the software provider.
	Method of assessment: Discussion

6.3 **Explain** a range of accounting requirements	The learner should be able to **explain** the accounting requirements for an equestrian business, to include:
	   • Information an accountant needs
	   • Costings for lessons and liveries
	   • Invoices
	   • Receipts
	   • Profit and loss
	   • Business viability
	   • Business plans
	   • Financial year

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	• Accountant interaction • On line tax payments • Personal /business allowance **Example level and depth of answer** **Receipts:** Receipts will be required for all goods or services that were bought for the business need. This could include goods such as food, bedding and hay and services such as building repair work, farrier and vet. The receipt should state the company or individual name and address and the goods or service that was provided, the rate of VAT, the date, total paid and method of payment. Receipts also need to be kept for any expenses that were accrued whilst on business use, for example fuel. These receipts will need to be stored safely and presented for the accountant/auditor at the end of the financial year. They will then be stored for six years, or as advised by the auditor/accountant. Method of assessment: Discussion
6.4 **Explain** how to manage business costs	The learner will know the difference between fixed and variable costs of an equestrian business and **explain** how to manage them: Fixed costs (largely unmanageable) • Rent • Business Rates • Licences • Insurance • Depreciation Variable costs (manageable) • Utilities (gas, water, electric, sewage etc.) • Stock • Feed • Professionals • Wages and salaries • Tack • Maintenance • Equipment • Expenses **Example level and depth of answer** **Fixed costs/rent:** Fixed costs remain the same to the business each month, no matter the output/goods/services the business produces. Variable costs vary with the amount of work/output the business produces. For example, the rent of the land/mortgage of buildings will largely stay the same each month no matter how busy or profitable the business has been or will be. It also does not fluctuate depending on the time of year. Fixed costs are largely unmanageable as usually there is little lee-way to these, the management would require paying these bills each month. Each year you may get a chance to review the rent or mortgage fees for example, but once set, they will remain constant each month. Discounts may be available if paid in one lump sum instead of monthly payments, or direct debit discount over credit/debit card payments. Method of assessment: Discussion
6.5 **Explain** pay requirements	The learner will be able to **explain** salary legislation and apply it to a business. Pay requirements to include:

for a business	- Minimum/living wage - Apprenticeship wage - Maternity - Sick pay - Pension - Redundancy **Example level and depth of answer** **Minimum/living wage:** The minimum age a worker gets is dependent on their age and if they're an apprentice. The National Minimum Wage is the minimum pay per hour almost all workers are entitled to. National Minimum Wage applies to any worker (non-apprentice) that is at least school leaving age. The National Living Wage is higher than the National Minimum Wage and applies to anyone over 25. It does not matter how small an employer is, they still have to pay the correct minimum wage. Contracts for payments below the minimum wage are not legally binding. The National Living Wage and National Minimum Wage change every April and the current rates can be viewed on the gov.uk website. Workers are also entitled to the minimum wage if they're part-time, casual labourers, agency workers, trainees or on probation, foreign workers or disabled workers. Workers not entitled to the National Minimum Wage or National Living Wage include self-employed people running their own business, company directors, volunteers or voluntary workers, workers younger than school leaving age, higher and further education students on a work placement up to one year, workers on government pre-apprenticeship schemes. (Source, www.gov.uk). Method of assessment: Discussion

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LO7. Understand record keeping requirements for an equestrian business
(Trainer Endorsement)
GLH 2; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
- ***Ensure the 'Trainer Endorsement' form in the learner's skills record is completed before the assessment day; this records that an assessment with the trainer has taken place***
- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
7.1 Explain records kept	Candidates will be able to explain different records kept by an equestrian business and how they are used: • Horse health records • Client records • Riding records/progress /review **Example level and depth of answer** **Horse Health Records:** Horse health records would include information regarding farrier, veterinary appointments, routine vaccinations, equine dental technician, saddle fitter, back/physio, any other professional as required or referred by vet. The records should state date of appointment, what occurred (routine treatment or other, for example), advice given, length of time before next appointment. The health records will be used to monitor routine health visits and identify any patterns or reoccurrences of issues that could then perhaps be managed differently in the future. Staff should be trained on the maintenance of the records, so all information is consistently recorded and stored for ease of use.
7.2 **Explain** how business information is stored	The learner should be able to identify information that is required to be stored and **explain** the requirements for this. Information may include: • Health and Safety (risk assessments, accident reporting, first aiders) • Employee records (contracts, bank details, emergency details, appraisals) • Financial records • Client records • Conflict of interest paperwork Storage requirements may include: • Filing requirements • Hard copy v electronic • Confidentiality • Data protection The learner should have an understanding of how long different types of information is required to be stored for, and how the information should be stored.

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	Example level and depth of answer
	Data protection:
	The General Data Protection Regulation (GDPR) was introduced to strengthen and standardise data protection policies for residents of EU member nations. 'Data' refers to any personal information stored. GDPR applies to all organisations. The processing and storage of data should comply with GDPR requirements. Consent should be received from the data subject (the person) with regards to storing their data and they should be informed how the data will be stored and for how long. The business will also need a process for dealing with any GDPR breeches.

LO8. Understand different marketing opportunities

(Ready for Assessment)

GLH 2; Self-guided study 3

- *This learning outcome is assessed on the assessment day*
- *The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below*
- ***Ensure the 'Ready for Assessment' form in the learner's skills record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.***

Assessment criteria	Guidance on level and depth of subject content
8.1 **Explain** different types of marketing	The learner should be able to **explain** different types of marketing and decide which is most relevant to a particular business. Types of marketing to include: - Using market research - Advertising (digital, press) - Electronic communication - Social media - Open days **Example level and depth of answer** **Market research:** - Market research helps to develop your business and to reduce future risks - You may want to identify current and future needs of your clients, the price they will pay for lessons or services, or to investigate the potential success of a promotional campaign - Primary research involves finding out new, first-hand information directly from your clients or potential clients. Methods of primary research include: Questionnaires, focus groups and observation - Secondary research involves gathering existing information from other sources and could include reading reports, trade magazines and other business websites Method of assessment: Discussion.
8.2 **Justify** different marketing campaigns	The learner will be able to justify which type of campaign will work for different business models, to include: - Choices of marketing types - How to record success

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	The learner will be given a scenario describing an equestrian business and how the business is performing. The learner should be able to plan a brief marketing campaign using at least two types of marketing and explain how they would be implemented. The learner should be able to provide reasons for the marketing types preferred and why other types of marketing may not be suitable for the business. Method of assessment: Discussion.

LO9. Understand how to manage a yard
(Trainer Endorsement)
GLH 5; Self-guided study 2

- *This learning outcome is assessed by the trainer. The learner's skills record should be signed off when the trainer is confident that the learner has met the demand of all the assessment criteria*
- ***Ensure the 'Trainer Endorsement' form in the learner's skills record is completed before the assessment day; this records that an assessment with the trainer has taken place***
- *The learner will be assessed in detail on one or more assessment criteria through a 'viva' process with the assessor on the day to clarify competence.*

Assessment criteria	Guidance on level and depth of subject content
9.1 **Compare** the benefits of different types of approval schemes for businesses	The learner will understand the different schemes available for equestrian businesses and compare the benefits of each. Types of approval schemes to include reference to quality assurance systems provided by scheme. To include: • BHS • ABRS • Pony Club • RDA • Other **Example level and depth of answer** **BHS** • BHS supports centres by helping them to provide the highest standards and conform to the latest health and safety requirements • BHS centres can advertise on the BHS website • The BHS can provide advice and support on numerous topics and issues • Approved Centres also have access to designated business support lines • Discounts available with companies such as Blue Chip and Mirrors for Training • Insurance discounts through South Essex Insurance Brokers • Access to join staff to the Accredited Professional Centre scheme as coaches, ride leaders or grooms. These professionals with then have access to discounts on assessments and other events and training such as first aid • BHS Approved Centres can deliver qualifications such as the Challenge Awards and the Riding School Assistant Helper • BHS Approval plaque to display at your centre • Free BHS Gold membership for the proprietor • Access to an online network of supporting documents including lesson plans and templates for business documents • Newsletters to keep you updated with changes that may affect your business

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9.2 **Explain** working relationships with a range of associated professionals	Candidates will be able to **explain** the value of working relations with a range of professionals, including: • Farrier • Vet • Feed/forage merchant • Equine dental technician • Physiotherapist • Saddle fitter **Example level and depth of answer** **Farrier:** A good working relationship with a qualified and registered farrier is essential, as the saying goes no foot, no horse. As the horses will be pivotal to the success of a yard, it is vital that essential healthcare, such as foot health, is managed correctly. A good working relationship with a farrier can be established by horses being ready on time, payments being made promptly and such care like dry, clean and picked out feet ready for the farrier to begin. If the farrier is there for a long time refreshements such as tea and coffee will be received well. Looking at your facilities will be helpful too such as ensuring a sheltered and covered area for the farrier to work and a level surface for the farrier to work on. Your farrier will be vital in the rehab of lameness or conditions that affect foot health (such as laminitis) so keeping them up to date with relevant vets appointments will also encourage a good working relationship. Routine appointments should try to be booked in advance to help the farrier plan their schedule and maintain good relations, this way, they may be more compliant to fit in emergency appointments when needed.
9.3 **Explain** how to maintain facilities.	The learner will be able to consider the facilities on the yard that need regular maintenance and **explain** a plan for this. Facilities may include: • Yards • Stables • Arenas • Store and ancillary building • Fencing • Maintaining surface for dressage/ jumping and riding school use • Importance of maintaining level surface • Controlling dust • Removing droppings • Cross-country course **Example level and depth of answer** **Arenas (non grass):** Maintenance should be done on a regular basis and recorded in a maintenance book or file. This can contain information such as the amount and type of fertiliser used on the fields, when to apply certain weed-killer and in what quantity. Also, when vehicle MOTs and plating need to be renewed and when servicing is due. If a certain amount of time is allocated to maintenance on a daily or even weekly basis much money can be saved and the yard will be safer and smarter. Depending on the type and size of the yard, it might make economic sense to employ a maintenance person on a part-time basis. Arenas- all surfaces will require daily levelling, and some very busy arenas may need to be harrowed twice a day. This is usually done with a tractor pulling a

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	harrow and leveller. Most types of surface will have a machine designed specifically for their maintenance. Particular attention should be paid to the outside track, the lungeing area and any part where jumping takes place. The surface in some arenas may move, especially if they have built on a slope, in which case you may end up with more surface at one end of the arena than the other. If this happens, professional assistance from the arena supplier may be needed.
9.4 **Explain** a range of safety and security procedures on the yard	The learner will be able to consider a range of safety methods and **explain** their use, to include: • Alarms • CCTV • Sensor lights • Security patrol • Effective access security **Example level and depth of answer** **Alarms:** Having someone living onsite is the best security measure; if accommodation is situated beside the yard entrance it is easier to keep an eye on comings and goings. Burglar alarms can be useful as they would be a deterrent if sounded, as long as the yard is within earshot of someone who will take notice, as many yard managers do not live on site. If not on site, consider alarms that trigger police or security being informed, they usually then would contact the proprietor. This would come with a service charge. The local police crime prevention officer can offer advice, ensuring that the most appropriate preventive measures are adopted. Alarms would generally not work as the only security measure, as fields, yard area and other buildings may not be covered by the alarm depending on layout of yard.

LO10.Understand how to manage grassland

(Ready for Assessment)
GLH 3; Self-guided study 2

- *This learning outcome is assessed on the assessment day*
- *The learner will be ready to take the assessment when they can demonstrate to the trainer all the skills and knowledge as outlined in the assessment criteria listed below*
- ***Ensure the 'Ready for Assessment' form in the learner's skills record is completed before the assessment day; this records the learner is of sufficient level to sit the assessment. This does not mean they will necessarily be successful in passing the assessment on the day.***

Assessment criteria	Guidance on level and depth of subject content
10.1 **Analyse** annual grassland maintenance programmes	The learner will be able to **analyse** several relevant factors relating to grazing and other grassland and produce a recommended plan for ongoing maintenance, to include: • Topping • Harrowing • Rolling • Fertilizing

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- Spraying
- Over sowing
- Weed control
- Fencing including electric
- Shelter
- Water
- Gateways
- Stocking rate
- Removal of droppings
- Soil analysis

The basic requirements for horse pasture management are to provide turnout and/or grazing for hoses all year round, to create and maintain grasses with a good bottom growth and the ability to produce a dense sward, to minimise infestations from worm larvae and to maintain the land as a good visual amenity.

The learner should be able to analyse the strengths and weaknesses of each of the maintenance points above, and to suggest a maintenance plan for an equestrian business. A scenario will be given to the learner for them to recommend a plan based on the requirements.

Method of assessment: Discussion.

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