



## Provide Technical Services

Occupational  
Standard Title

### ASSESS, EVALUATE, AND RECORD HORSE CONFORMATION, CONDITION, AND GAIT

#### Overview

This standard covers the collection of data relating to horse conformation, condition, and gait during the appointment. It is important to record clear, concise, and thorough notes at each visit so that you, your client, and other equine professionals may consult them and track changes through time. Records will be examined in the case of complaint.

Collecting this data requires strict adherence to set procedures and the skill to repeat them accurately and correctly. You should follow a system so that no step in acquiring data is missed. This system must reflect your speciality area/s, training and qualification, any data collection requirements of a saddlery or livery supplier, and codes of conduct and practice to which you adhere.

Good communication and observation skills are vital, and you should review performance and outcomes continuously so that they may be developed and improved.

Depending on your findings it may be necessary to cease your fitting appointment and recommend next steps to your client.

You may also refer to:

- LANCS68** Work within professional, legislative, and regulatory requirements for animal health and welfare
- LANCS4** Establish and maintain working relationships
- LANEHC9** Assess and manage equine behaviours
- LANCS69** Monitor and maintain health and safety when working with horses
- EFCTS01** Obtain, evaluate, and record equine signalment, details, and history



## Provide Technical Services

### Performance Criteria

You must be able to:

- P01 Present yourself in a professional manner
- P02 Listen attentively to the client and record relevant details
- P03 Perform and repeat data collection procedures
- P04 Demonstrate and use an appropriate depth and breadth of understanding of equine anatomy, physiology, movement, behaviour, and pathology
- P05 Assess and describe condition of the horse
- P06 Skilfully use observation and palpation to inform assessment
- P07 Use appropriate tools to collect and accurately record information
- P08 Work safely around the horse with respect for their welfare
- P09 Explain to your client and other equine professionals how information is collected, recorded, and used
- P10 Communicate the significance and consequences of data collected to the fitting and the fitting process
- P11 Communicate the significance and consequences of data collected to the fitting and the fitting process



## Provide Technical Services

### Knowledge and understanding

#### Professional standards of dress and behaviour

You need to know and understand

|     |   |
|-----|---|
| K01 | How to dress and present yourself correctly   |
| K02 | How to introduce yourself, and establish the boundaries of your engagement                        |
| K03 | How to establish a rapport with your client and others  |
| K04 | How to describe the process with your client, reasons to perform each step, and possible outcomes |
| K05 | How to record information physically or digitally   |

Scope and range

- Structure forms to reflect correct method and sequence
- Input concise, correct, clear, and legible data

|                 |  |
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| K06             | Have all necessary tools to hand and in good condition   |
| Scope and range | <ul style="list-style-type: none"> <li>• What you need to take measurements</li> <li>• What you need to record measurements</li> </ul> |

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| K07 | Work within the scope of your role, training, and expertise |
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#### How to work safely with the horse

You need to know and understand

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| K08             | Behavioural indicators in the horse so that your behaviour may be adjusted to avoid stress or discomfort   |
| Scope and range | <ul style="list-style-type: none"> <li>• Ethograms of the ridden and unriden horse</li> <li>• Behaviour</li> <li>• Feedback from the handler or guardian</li> <li>• Your experience of horses, or of this horse</li> </ul> |



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| K09  | Appropriate protective clothing and equipment  |
| Scope and range  | <ul style="list-style-type: none"> <li>• Ensure you have correct protective equipment in good condition             <ul style="list-style-type: none"> <li>◦ Footwear</li> <li>◦ Gloves</li> <li>◦ Riding hat</li> <li>◦ Long sleeves and legs where possible</li> </ul> </li> <li>• Minimise jewellery and ensure hair is tidy</li> </ul>   |
| K10  | When and how to handle the horse   |
| Scope and range  | <ul style="list-style-type: none"> <li>• Explain the process to the client and/or handler</li> <li>• Effectively communicate with the handler so that they may safely and correctly perform, or delegate, required tasks,</li> <li>• Know, and be able to explain, how to sensitively and effectively ask the horse to stand square</li> <li>• Know, and be able to explain, how to sensitively and effectively ask the horse to move in a straight line or on a circle</li> <li>• Have appropriate insurance to cover care, custody, and control of the horse</li> <li>• Decide to continue or halt the fitting process</li> </ul>  |
| <b>Assessment of appearance, conformation, and condition</b> |  |
| <b>You need to know and understand</b>                       |  |
| K11  | How to describe horse appearance and conformation using appropriate veterinary and technical terminology   |
| Scope and range  | <ul style="list-style-type: none"> <li>• Stand the horse square and safely assess conformation, including the feet, using correct veterinary terminology             <ul style="list-style-type: none"> <li>◦ Understand joint angles in the context of the whole horse</li> <li>◦ Know and appropriately use commonly understood descriptive terms such as 'cow-hocks', 'roach back', 'toe-in'</li> </ul> </li> <li>• Note bony landmarks             <ul style="list-style-type: none"> <li>◦ Know skeletal anatomy</li> <li>◦ Assess and record symmetry</li> </ul> </li> <li>• Understand how to assess factors that may influence fit</li> <li>• Note muscle development</li> </ul> |



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|                 |   | <ul style="list-style-type: none"> <li>○ Symmetry and relative proportion</li> <li>● Note posture, attitude, and general demeanour</li> </ul>   |
| <b>K12</b>      | How to record weight and condition  |   |
| Scope and range |   | <ul style="list-style-type: none"> <li>● Use a weight-tape or different system of measurement to estimate weight, for example Carroll &amp; Huntington (1988):             <ul style="list-style-type: none"> <li>○ <math>\text{Weight (kg)} = (\text{girth}^2 \text{ (cm)} \times \text{length (cm)}) / 11877</math></li> </ul> </li> <li>● Use a scale from 1–5 or 1–9 with pictorial guidance to record a condition score</li> <li>● Take photos showing the whole horse in good light and stood square on a flat surface. It is good practice to gain permission.</li> <li>● Understand, and be able to explain, factors that influence condition.</li> <li>● Understand and be able to explain why condition affects the horse in work and may influence fit of saddlery and livery</li> <li>● If necessary, refer the client to appropriate equine professionals or welfare organisation</li> <li>● Be able to evaluate freely available sources of information to recommend trustworthy resources to the client</li> </ul> |
| <b>K13</b>      | How to recognise and accurately record signs of infectious disease, and what action to take |   |
| Scope and range |   | <ul style="list-style-type: none"> <li>● Signs of ill-health:             <ul style="list-style-type: none"> <li>○ Hair and skin changes</li> <li>○ Discharge from the nose, mouth, or eyes</li> <li>○ Gastrointestinal signs</li> </ul> </li> <li>● Advise to contact the vet and isolate the horse</li> <li>● Wash hands and other contact areas</li> <li>● Remove and double bag clothing</li> <li>● Carry spare clothing and protective clothing</li> <li>● Wipe down any equipment or stock with a suitable preparation</li> <li>● Advise subsequent clients of possible contamination and postpone appointments if necessary</li> </ul>   |



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### Assessment of gait and soft tissue

You need to know and understand

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| K14             | Assess gait and movement   |
| Scope and range | <ul style="list-style-type: none"> <li>• Explain to the client how you would like the horse walked and trotted up, and/or moved</li> <li>• Observe the horse in movement             <ul style="list-style-type: none"> <li>◦ Understand how to gauge symmetry of movement</li> <li>◦ Note symmetry of movement</li> <li>◦ Note sound and rhythm of footfall</li> </ul> </li> <li>• Carry out passive movement tests as trained</li> <li>• Evaluate associated behaviours, especially those that may indicate discomfort</li> <li>• Know how to describe gait and movement in writing using correct veterinary terminology             <ul style="list-style-type: none"> <li>◦ Anatomical location, i.e. medial, lateral</li> <li>◦ Anatomical landmarks</li> </ul> </li> </ul> |
| K15             | Perform a basic palpation of soft tissue   |
| Scope and range | <ul style="list-style-type: none"> <li>• Carry out basic examination of soft tissue following training guidelines</li> <li>• Wear appropriate protective equipment</li> <li>• Follow a system of scoring for horse response to palpation, and the feel, appearance, or other characteristics of soft tissues</li> <li>• Record your findings using correct terminology</li> </ul>  |

### Record horse dimensions

You need to know and understand

|                 |  |
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| K16             | Taking measurements according to your training and system of fitting   |
| Scope and range | <ul style="list-style-type: none"> <li>• Know how to prepare the horse to correctly take measurements</li> <li>• Use the specified or recommended equipment to take measurements             <ul style="list-style-type: none"> <li>◦ Flexicurves or other means to take a pattern or record the shape of the horse</li> </ul> </li> </ul> |



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- A measuring tape or device
- A camera or video recording device
- Other digital or physical method to record dimensions appropriate to fitting
- Know at which points of the horse and how often to take measurements
- Use the same technique every time
- Check your findings and repeat if necessary
- Be able to explain why it is important to record and repeat measurements during and between appointments

### Follow procedure and operate within a system

#### You need to know and understand

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| <b>K17</b>      | Which steps are taken and in what order, and why adhering to a system is important |  |
| Scope and range |  | <ul style="list-style-type: none"> <li>● The system and procedures underpinning your training and/or qualification</li> <li>● Why one step should precede or follow another</li> <li>● Additional data reasonably required by equipment suppliers, and when in the process and how this data is collected</li> <li>● Why physical/digital data collection methods (forms) should reflect and guide the appointment</li> </ul>  |
| <b>K18</b>      | The importance of consistent use of terminology                                    |  |
| Scope and range |  | <ul style="list-style-type: none"> <li>● Effective and efficient communication with paraprofessionals and other paraprofessionals</li> <li>● Consistent record keeping</li> <li>● Be confident that information has been transmitted as intended – preventing misunderstanding               <ul style="list-style-type: none"> <li>○ Between fitter and guardian</li> <li>○ Between fitter and paraprofessionals</li> <li>○ Between fitter and supplier of goods</li> </ul> </li> </ul> |



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### Record data

You need to know and understand

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| K19             | Other types of information that should be collected to inform your work  |
| Scope and range | <ul style="list-style-type: none"> <li>• Veterinary history of injury, lameness, and sickness</li> <li>• Other healthcare history, such as             <ul style="list-style-type: none"> <li>◦ Dentistry records</li> <li>◦ Physiotherapy or chiropractic records</li> <li>◦ Foot care history or records</li> </ul> </li> <li>• Concerns relating to riding or working and the saddlery or lornery, or the horse or client</li> <li>• Themes of feedback from coaches or trainers</li> <li>• Photography or video, with owner and/or equestrian permissions</li> </ul> |
| K20             | How you will store data securely maintaining confidentiality   |
| Scope and range | <ul style="list-style-type: none"> <li>• How to design or select appropriate physical or digital methods to collect information</li> <li>• How to cross-reference or link client records taken over time, or in different formats</li> <li>• How to protect data physically (e.g., locks) or digitally (e.g., passwords, encryption)</li> <li>• How to gain permission to share data</li> </ul>  |

### Evaluate findings

You need to know and understand

|                 |  |
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| K21             | How to evaluate the data collected   |
| Scope and range | <ul style="list-style-type: none"> <li>• Evaluate all information collected to this point             <ul style="list-style-type: none"> <li>◦ Signalment and basic objective data</li> <li>◦ History and current issues</li> <li>◦ Intended use</li> <li>◦ Conformation, condition, and posture</li> <li>◦ Gait and soft tissue</li> <li>◦ Relevant dimensions</li> </ul> </li> </ul> |





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- Attitude, stress, behaviours
- Identification of themes or correlations
- Comparison of information taken over time, throughout the appointment, and/or clinicians and other practitioners
- Consider how the combined data reflects the fitting needs of the horse and equestrian

### Communicate findings and make recommendations

#### You need to know and understand

**K22** How to clearly and sensitively communicate your findings and conclusions

- Scope and range
- Summarise findings and check understanding
  - Make recommendations and explain the associated duration and costs
  - Know whether to continue or halt the appointment or phase of the appointment
    - Know which criteria to set before recommencing or rebooking the appointment
    - Know when to refer the client

*If you feel the horse is at risk you may seek support from a welfare charity representative without sharing details of the responsible person, horse, or location.*



## Provide Technical Services

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| Developed by             | The Equine Fitters Council Working Group                               |
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