EQUEST

Project result 3: Module 6 of 6

Module 6: Evaluation & Best Practices in EAI

Practical Guidelines for Outcome-Oriented Progress Tracking, Multidisciplinary Coordination, and Equine Welfare Monitoring

Exercises in this module:

- 6.1 Practical Session Observation & Internal Team Reporting Log [STAFF ONLY]
- 6.2 Dual-Perspective Session Observation Sheet (Participant Engagement & Equine Welfare) [STAFF ONLY]

Exercise settings:

- [STAFF ONLY] no participants or horse
- [STAFF + HORSE] no participants
- [OBSERVING A LIVE SESSION]
- [WITH PARTICIPANTS]

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1. Outcome-Oriented Progress Tracking & Multidisciplinary Roles

To establish equine-assisted practices as a professionalised, evidence-based field, progress evaluation must move beyond subjective anecdotal notes. However, structured evaluation must strictly distinguish between Equine-Assisted Interventions (EAI), comprising goal-oriented clinical therapy (Animal-Assisted Therapy, AAT) and structured education (Animal-Assisted Education, AAE) and general Equine-Assisted Activities (EAA) (recreational riding, adapted leisure, or sports).

While general activities focus on recreational participation, EAI requires objective, structured tracking within recognised medical, psychological, pedagogical, and ethical frameworks.

To safeguard legal boundaries and prevent professional intrusion, evaluation in EAI is distributed across the multidisciplinary team, where each specialist evaluates progress strictly within their certified scope of practice:

1. **Somatic & Neuromotor Rehabilitation (Exclusive to Licensed Physiotherapists / Physiatrists):** Evaluates postural alignment, pelvic symmetry, dynamic equilibrium, and muscle tone regulation in response to the horse's three-dimensional movement impulses.
2. Communication & Psychosocial Development (Exclusive to Psychologists / Speech & Language Therapists): Monitors social cognition, emotional self-regulation, adaptive behaviour, and functional vocabulary.
3. **Cognitive Mediation & Task Learning (Exclusive to Special Educators / Psychopedagogues):** Assesses executive functioning, working memory, task sequencing, and problem-solving during equine grooming, tacking, and spatial riding routes.
4. **Equine Welfare, Ethology & Handling (Exclusive to Certified Equine Specialists / Handlers):** Tracks the horse's physical soundness, emotional state, stress micro-expressions, and relational reciprocity before, during, and after sessions. To aggregate these specialised observation planes into a coherent report without causing professional overlap, the team utilises Goal Attainment Scaling (GAS)[1]. GAS allows each specialist to set independent, standardised 5-point goals (+2 to -2) for the participant. This provides facility directors, medical boards, and caregivers with a single, consistent progress report grounded in individual clinical and ethological expertise.

2. Ecosystemic Mapping & Network Management

Equine-assisted sessions exist within a multi-layered ecosystem connecting Participants, Parents/Caregivers, Therapists, Physicians, Instructors/Educators, Horse Handlers, Facility Managers and other staff.

To protect participant privacy and maintain clinical integrity, all communication must strictly comply with General Data Protection Regulation (GDPR Article 9) provisions regarding special category health data[2].

Practitioners are strictly prohibited from sharing individual observational logs or media on public social channels or with unauthorised third parties.

3. Practical Learning Exercises

Exercise 6.1 Practical Session Observation & Internal Team Reporting Log

[STAFF ONLY] | **Who:** All team members (after a session) | **Time:** 5 minutes | **You need:** The centre's Post-Session Observation Sheet

Objective: Learn how to record clear, non-clinical session observations using a standardised observation sheet to support internal team record-keeping.

Instructions:

A participant attends a weekly equine-assisted session at your centre. As part of your routine operational duties following the session, you are required to spend 5 minutes completing the centre's standardised Post-Session Observation Sheet before filing it for the multidisciplinary team leader (Referente di Intervento / Project Coordinator).

Task 1: Record objective observations from a 30-minute session across three practical areas:

Observation Domain	Rating / Checkbox	Observable Reaction / Note
1. Physical Balance & Posture	☐ Independent balance ☐ Mild assistance needed ☐ Continuous physical support	e.g. "Maintained independent trunk balance at a walk; required verbal prompts during turns"
2. Communication Cues	☐ Visual pictograms used ☐ Verbal phrases spoken ☐ Non-verbal gestures	e.g. "Used visual cards to choose soft brush; spoke two-word phrases when requesting horse to move"
3. Routine Task Completion	☐ Fully independent ☐ Partial guidance needed ☐ Full physical assistance	e.g. "Completed brush selection independently; required guidance to groom horse flank"

Task 2: Write a brief, objective 3-4 sentence note for the participant's internal file:

- **Sentence 1:** Overall activity completed and engagement level.
- **Sentence 2:** One specific observable success or positive interaction.
- **Sentence 3:** Practical recommendation for the next session (e.g. "Prepare visual cards for tacking before entering the stall next week").

Task 3: Answer the following two operational questions on data privacy & communication boundaries

1. Where should the completed observation sheet be stored immediately after the session to comply with centre privacy/GDPR rules?
2. Who on the team is authorised to receive this report, and why is the practitioner prohibited from directly sharing this log with external parties or on social media?

Builds on Professional Profile (R1) competency 1.5

Exercise 6.2 Dual-Perspective Session Observation Sheet (Participant Engagement & Equine Welfare)

[STAFF ONLY] | **Who:** The EAI team (after a session) | **Time:** A few minutes | **You need:** The Dual-Perspective Observation Sheet

Objective: Learn how to simultaneously monitor participant engagement and equine stress cues using a simple, non-clinical operational checklist.

Instructions:

Following a 30-minute session, the EAI team takes a few minutes to complete this Dual-Perspective Observation Sheet. Instead of complex mathematical scoring, they use a practical Traffic Light Decision System (Green / Yellow / Red).

Task 1: Dual Observational Checklist

Focus Domain	Observational Parameter	Checklist Rating
Part A: Participant Cues	1. Calm Contact	☐ YES ☐ NEEDS ATTENTION
Part A: Participant Cues	2. Safety Compliance	☐ YES ☐ NEEDS ATTENTION
Part A: Participant Cues	3. Positive Engagement	☐ YES ☐ NEEDS ATTENTION
Part B: Equine Welfare	1. Facial & Ear Expression	☐ YES ☐ STRESS SIGNAL (e.g. pinned ears, tight muzzle)
Part B: Equine Welfare	2. Movement & Body Tension	☐ YES ☐ STRESS SIGNAL (e.g. hollow back, tail swishing)
Part B: Equine Welfare	3. Physical Fatigue	☐ YES ☐ STRESS SIGNAL (e.g. heavy breathing, lethargy)

Task 2: Based on the completed checklist, select the appropriate operational action for the next session:

GREEN (standard continuation): All items in Part A and Part B checked as YES → Continue standard session plan.

YELLOW (session adaptation required): Any item in Part A marked NEEDS ATTENTION, or exactly one item in Part B marked STRESS SIGNAL → Modify next session.

RED (immediate rest / halt): Two or more items in Part B marked STRESS SIGNAL, or clear physical overexertion noted → Halt work immediately, return horse to pasture/stall, and report to team leader.

Task 3: Write a brief, one-sentence note for the centre's internal records.

Builds on Professional Profile (R1) competency 1.2, 1.5

Notes and sources

1. Kiresuk, T. J. and Sherman, R. E. (1968). Goal attainment scaling: a general method for evaluating comprehensive community mental health programs. Community Mental Health Journal 4(6): 443–453.
2. Regulation (EU) 2016/679 (General Data Protection Regulation), Article 9: processing of special categories of personal data, including data concerning health.