

# Fundamentals of Horsemanship



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Choosing the Correct Bits and Achieving True Flexion and Responsiveness.....	1
Catching the Horse .....	3
Lunging .....	4
Saddling .....	5
Getting on and Preparing for Your Ride .....	5
The Ride.....	6
Body Position of the Rider.....	6
Using Legs and a Slow Hand as Power Steering.....	6
Perfecting the Whoa .....	7
Final Element .....	9
Walk Them Down.....	9



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## Overview

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The following publication presents material to the new horse owner who wishes to learn more about basic horsemanship principles. Additionally, it covers the time from the moment you catch the horse to when you step out of the stirrup and complete your ride. We hope the reader will find this information useful when trying to improve their horsemanship skill sets. Each section should be completed and mastered before proceeding to the next. The targeted audience will be individuals interested in enrolling in the 4-H horse program or adults seeking a greater understanding of horsemanship.

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# Fundamentals of Horsemanship

Mark Russell, Instructor - Animal Science

## Choosing the Correct Bits and Achieving True Flexion and Responsiveness

One of the most common areas of concern is the topic of bits. Before we can catch and ride our horse, we must decide on the proper bit to use. The bit we choose should be a direct reflection of the level of our horse, the event/activity we participate in and our level as horsemen.

Unfortunately, I have found that the more we rely on the bit we are using, the more we stray away from true harmony with our horse. Having a bit with long shanks combined with a high port doesn't make our horse more broke. What it can do, however, is add a certain amount of polish on a "finished" horse. A smooth snaffle bit can cause just as much damage as a correction bit in the wrong hands. Likewise, a correction bit (see below) can be just as mild as a smooth snaffle when used correctly. That being said, most of the time when you are riding at home, your horse should be in a snaffle bit, such as the one seen below.



**A western correction bit**



**A smooth snaffle bit**

The advantages of using a snaffle bit are many. But before we advance to the snaffle bit, the horse should be flexing in the halter. One of the first things I teach a horse before I even throw a leg over him is to give to pressure. This can be taught as early as their yearling year. Stand at either side of your horse (horse should be haltered) with lead rope in hand. Slowly pull his head to the side on which you are standing.

As soon as he gives to the pressure, give back. Repeat five or six more times on each side of the horse.

Once the horse gets closer to being two years old or has passed his two-year-old year and has mastered flexing with the halter only, you can now begin to think about putting a smooth snaffle bit in his mouth and flexing him with that. It is a good idea to let him stand tied in 15-minute increments with the bit in his mouth. This will require very little from him the first time you put the bridle on him and will allow him to see that there are breaks. In doing so, you are giving him a chance to carry the bit and get used to it without ever pulling on it.

Once the horse has carried the bit for awhile, you can begin to flex him in the same manner you did with the halter. The best benefit of this exercise is that he can get more and more used to the bit without having to be saddled, thus avoiding any added stress. If you ride with me long enough, you will find that one of my goals around horses is to keep their stress level down as much as possible.

One of the main advantages of having this head start with your horse will be the added control you will have when you begin the breaking process. I tell many of my students they will have much more control over the horse when they begin to break him if they have spent some time flexing him first. After you get on for the first time and your horse acts as though he's going to pitch a fit, pulling his head to one side and walking or trotting in a small circle will settle him down. However, it can't be done if

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his neck isn't soft and bending properly. I will typically keep a horse in a smooth snaffle bit his entire two-year-old year. With any bit you use, it is acceptable to use both hands. However, when riding with a snaffle, it isn't just acceptable, it is recommended.

Depending on the level of the horse after his two-year-old year, I may use a snaffle bit that has a slow twist to the mouthpiece.



**D-ring snaffle with a "slow twist"**



**Snaffle with a "faster/harder twist"**

The intended purpose of a bit with a twisted mouthpiece is strictly for training purposes. It serves as a tool to "soften up" the horse's mouth and make the horse more responsive . . . if used responsibly and carefully. The larger the mouthpiece and slower the twist, the more mild the bit will be. In turn, the smaller the mouthpiece and faster/harder the twist, the more severe it can quickly become.

Every time I lift on my reins, no matter the type of bit, I preface with a squeeze from my legs. This is my cue to the horse that something is coming. I never want to sneak up on my horse and pull on the reins without giving a warning first. But what are some the other benefits of using legs first? When we use our legs first, we are training the horse to rely on our legs as our means of communication. We can also keep the horse more collected and prevent him from breaking gait.

Maintaining forward motion is extremely important when training horses. Horses tend to understand things when we combine our training methods with forward motion. Before we know it, our horse is dropping his head and rounding up his back, based solely on a squeeze from our legs and with very little or no contact with the bit. When we squeeze with our legs and lift with our hands, our horse should give his face and pick his back up. Some horses do it better at the walk. Some do it better at the trot

or jog. Each horse has his own personality, and it is up to us to figure out what that personality is and how we can adapt our training program to that personality.

If we have been successful up to this point, we can possibly advance to the next level of bit (usually halfway through his three-year-old year). I consider the bit on the left side below to be a good one to move up to. It is considered a snaffle bit, but with shanks. Thus, it is a shanked bit. The bit below on the right is considered a "medium" port bit with a roller.



**Snaffle bit with shanks**



**"Medium" port bit**

These types of bits allow for more leverage and greater amounts of control. However, we must be careful when using them to be soft with our hands. It is critical at every moment of working with our horses that we are soft. This gets multiplied by about 10 when using leverage bits. If you choose to show in a shanked bit, it is only permissible if you are riding with one hand. In training, I will often ride with two hands for the simple fact that I can do a better job training and communicating with my horse.

Choosing the bit you use can be a challenging task. There will be times when you have several options, and all may have advantages. When starting out, it is important to seek that soft and supple reaction. If we don't have that achieved, the best option is to rewind a few steps. You will find your ride will be much more pleasant with a horse that responds to contact with your legs and hands in a willing and responsive manner. It all begins with those bending exercises and releasing as soon as they give to pressure. If we reward them at the right time, their responsiveness will begin to be quicker and quicker and will ultimately lead to more harmony with our horse.

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# Catching the Horse

Whether working with a familiar, gentle horse or an unfamiliar, temperamental horse, safety is of the utmost importance. Horses are prey animals, which explains many of the behaviors they demonstrate. For example, when afraid, their instincts tell them to either run or fight when they do not understand what is going on around them. Because this fight or flight response is combined with a much different field of vision than humans have, a hazardous situation can happen quickly. Safety and care become even more significant to keep in mind when working with unfamiliar horses or when handling stallions.

## Leading the Horse

When leading a horse, you should use a long lead shank and always use both hands. If a horse rears up, release the hand nearest the horse to avoid being pulled with the horse. It is also best to lead from the left side, using the right hand to hold the lead nearest the horse. The excess portion of the lead should be rolled and held in a figure-eight style. The handler's elbow can be used to keep the head and neck straight and to prevent the horse crowding into the handler's space, potentially knocking the handler over or stepping on the handler's feet.

It is good to lead the horse occasionally from the right side so the horse becomes familiar with being handled from both sides. There may be situations, such as loading a horse on a trailer, where the only option is to lead the horse from the right side. So it is a good idea to practice leading from the right occasionally.

## Holding the Lead Rope

Never roll the excess lead shank or lead rope around the hands, wrist or any other part of the body. If the horse runs off when being led in

this manner, the handler can potentially become entangled in the lead shank and be dragged by the horse. Please see illustration in the lunging section for an example of properly holding a lead rope.

Most lead ropes have a knot at the end of the rope. The knot aids in maintaining a secure grip when needed for control. If your lead rope or lead shank does not have a knot at the end, one should be made immediately. It is also a good idea to avoid wearing jewelry around horses. When caught, rings cut deeply into fingers, and earrings can easily be caught in reins or lead shanks.

## Leading Through Openings

Caution should also be taken when leading a horse through a narrow opening. Horses have a tendency to panic when being led through a small opening and can consequently try to hurry through. This can present a problem for a handler if he or she is not in proper position. The handler should step through the opening quickly and step to one side to avoid crowding the narrow opening or doorway.

## Turning Out

Judgment should also be used when turning a horse loose in a pasture, arena or round pen. Lead the horse completely through the gate or door, and turn the horse around facing the direction from which it just entered. Remove the halter slowly and carefully. Take caution to avoid allowing the horse to bolt quickly. Good habits can prevent accidents. To reduce the chances of becoming entangled, avoid using excessively long lead ropes. Take your time when handling your horse. Remember the old saying when handling your horse, "Take more time, so it takes less time."

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# Lunging

Prior to riding, it is always a good idea to “take the edge off” or get your horse a little tired. This is extremely crucial for horses who are young or who have not been ridden in a while.

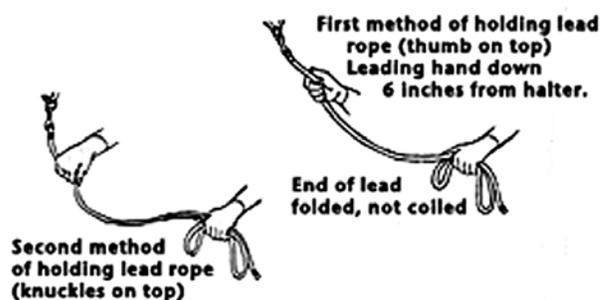
- This can be done either in a round pen or in a safe, enclosed area with a lunge line. If you are using a round pen, it is best to hold the lead rope so there is nothing the horse can hang on while loping or trotting in the round pen.



- If you are using a lunge line, it is important to hold the lunge line up at chest level to ensure that the horse does not step on the lunge line. If this does happen, it is best to slowly gather the lunge line and pull the horse towards you. While doing this, say “whoa” softly and easily in an attempt to slow the horse. Typically, a horse can become tired and in a better position to be ridden after 10 to 15 minutes of riding.



- While holding the lunge line, never hold the coils in your hand. If the horse takes off, the coils can become entangled in your hand and may cause the horse to drag you. It is best to hold the excess lunge line together (it will look like a figure 8) so that if the horse spooks, the handler can simply let go of the excess line. Additionally, keep any excess lunge line away from your legs and feet so you do not trip over the line or get a leg or foot stuck in it.



### Leading don'ts:



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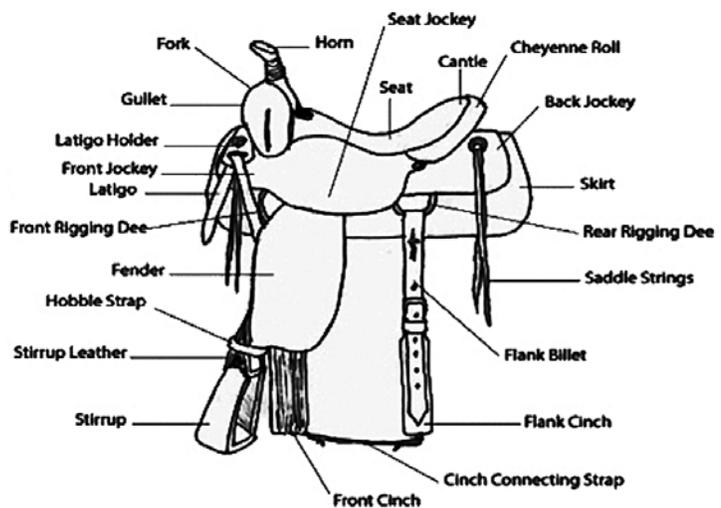
# Saddling

When saddling your horse, you must check all equipment before putting the saddle over the horse's back. Inspections should occur before the ride begins and also periodically during the ride.

- Begin by checking the stirrups and stirrup leathers of each side of the saddle.
- Other items to check: the latigo strap, cinch, off billet and hobble strap.
- Your saddle must have a cinch-connecting strap (the strap that connects the front cinch with the flank cinch). If it does not have this strap, the flank cinch can fall back on the horse and become tight around the flanks, causing the horse to buck.
- Ensure that the horse is properly tied up with nylon or rope halter.
- Make sure there is nothing under the saddle pad or between the saddle pad and the saddle.
- The stirrup and cinch should be flipped up over the saddle so equipment does not become entangled when throwing the saddle over the horse.

Bridling should be done with extreme care. The horse should be untied. The handler can leave the halter on if there is a chance he

or she will need to tie the horse up through the course of the day. Check the cinch to ensure it is tight enough, in case the horse may back up or move around and cause the saddle to slide around. If the saddle is loose, it can potentially slide under the horse, causing it to spook and creating a dangerous situation. When placing the bridle on the horse, stand to the left side of the horse, holding the top of the bridle with your right hand and keeping the bit in your left hand (down by the horse's mouth).



## Getting On and Preparing for Your Ride

When preparing to mount, make sure you are in a safe area. While many trails don't offer an enclosed place to get on, you can still ensure some safety for yourself and your horse by finding an area that's clear of poles, logs, concrete surfaces and fences. While there is technically no "right" or "wrong" side to get on the horse, it's always best to be consistent with the side you are using. Historically, most people have gotten on from the left side of the horse; and most horses are used to this side.

1. Check the saddle cinch to make sure saddle is tight.
2. When first stepping on, grab the reins and hold firmly. They cannot be excessively tight or the horse will back up. The reins cannot be too loose either, as the horse will almost always attempt to walk away.

3. Place your left foot in the stirrup and use the saddle horn with your left hand (while holding the reins). Your right hand should be on the seat of the cantle. Pull yourself up on the horse while using your left foot to push.
4. Once on the horse, back up a few steps. This is a good maneuver to do, as it allows your horse to be in the habit of not being allowed to walk forward.

After you have mounted and are in a place to begin your ride, the first thing you should think about is your surroundings. If you're going on a trail ride, the layout of the area will be much different than that of an arena or round pen. Horses will spook at nearly anything, so keep an eye on your surroundings. Make every attempt to notice anything that may cause your horse to spook long before he notices it.

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# The Ride

## Body Position of the Rider

Starting with your heels and working up, the heels of the rider should be pointed down with the toes pointed up. The reasoning behind this is that the rider can maintain his/her weight centered much more easily in this position. The picture below can serve as a reference as to where the shoulders, hands, legs and feet of the rider should be.

- It is also easier for the rider to keep his/her weight down in the seat of the saddle if their heels are down. You will find that if your weight is deeper in the saddle, it is a more comfortable ride and easier to maintain balance at both the trot and lope.
- Your heels should also be directly below your belt, making a straight line up to your shoulders. Shoulders should remain straight and not sway back or forward. Your horse's speed is more consistently maintained through straight shoulders.
- Hands should be square and reins should be held with two hands whenever possible.



## Using Legs and a Slow Hand as Power Steering

If we rely completely on our hands to guide our horses through a pattern or down the trail, we take a great chance of making our horses hard mouthed. The ultimate goal for everything we do on our horses should start with a soft mouth. This starts with soft and slow contact with the bit. Most people have heard of being soft with our hands, but what about being slow?

What exactly do I mean by using slow contact with our hands? Being slow with our

hands will slow everything down with our horse. It teaches the horse to be more patient and trust us much more. Horses will react to every amount of pressure we put on their reins. How much they react is entirely up to them. We should do everything we can to ensure our horse remains soft, and being slow with our hands gives us more confidence that he will be soft. Horses are very much like humans – if something sneaks up on us, we are more likely to have a negative reaction. It's the same with horses. If we sneak up to them with our hands, the reaction will be negative almost all the time.

It's only natural to want to rely on our hands to steer our horse the direction we wish to go. The biggest aid for making a soft mouth is a horse that moves away from leg pressure.

- If I squeeze with my right leg, I want my horse to move to the left. Likewise, if I push with my left leg, I want my horse to move to the right. If I pull my horse to the left, I complement it with a squeeze from my right leg.
- When squeezing with my leg, I use my calf to do the majority of the squeezing. If using my calf isn't enough, I will use my heel. I ride in spurs about 99% of the time, so I try to be light with my spur as much as I can. Being slow with my leg is as important as anything I do with my horse.
- Most of the time when I see a rider who wants to slow their horse down, it can be achieved by slowing his/her leg down. It's amazing how much we can make our ride more enjoyable just by slowing our legs and hands.

When turning our horse any direction, it's important to keep the outside rein loose as much as possible.

- If we keep our outside rein too tight, it will cause the horse to not understand which direction to go and will ultimately cause our horse to lose any softness and suppleness it may have. Just because a horse starts off really soft doesn't mean he will stay that way forever. It is up the rider to maintain it.

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When breaking a two-year-old, start softening him up before you get on him. This can be done by line driving. Once you are on the colt, start asking the colt to move away from leg pressure immediately. Every little bit of effort should be rewarded. One step in the correct direction is all you should ask for. If you get that one step, pat the colt on the neck and walk around for a minute or so, then do it again. If the horse is rewarded for each little bit of effort he puts in, it will be amazing how quickly he will learn to move away from pressure.

Lastly, it is equally important to look up and look the direction we wish to go. If we look down and drop our shoulder, the horse is going to drop his shoulder and knock down a barrel or cut into a circle and cheat us out of a correct maneuver. Our body will follow where our eyes take us.

### **Perfecting the “Whoa”**

One of the most important things we can teach a horse is “whoa.” The younger we begin to teach them, the easier and less stressful it will be. Simple ground manners can go a long way when working with a young horse, and it all begins with teaching them what “whoa” means.

When riding a young horse, one of the important things the horse needs to know is how to stop. As they get older and you start taking them out around other dangers and distractions, it becomes more critical that they know what the word “whoa” means. There are many methods to be used to accomplish the kind of stop you need. Most of the time when I hear stories of horses running off, it’s on a horse that didn’t have a good “whoa” to begin with.

For a horse that you are just getting broke, this should be one of the first things you work on. After you’ve put between 60 and 90 days on one, you can really start to perfect the stop.

There are four separate methods I use to stop a horse and to train him to stop. When all four are used together, the result is usually really good. However, this method of teaching a horse to stop reaches beyond teaching safety;

it also is applicable to performance horses and extremely helpful in the working events, such as reining, working cow horse and ranch horse events. Teaching them while they are still young and green can make the stop become much more efficient than if we wait to emphasize it later down the road.

### **Technique #1**

The first method to use when riding a two-year-old to teach them “whoa” is to simply say “whoa.” Begin to use this method of stopping the horse, even on the first ride. Don’t pull back and don’t sit down. Simply say “whoa.” Many times, they won’t stop on the first, second or third try. However, they eventually will stop. This is where our ground work and ground manners should come in extremely handy.

The word “whoa” should be familiar to them before you even put a foot in the stirrup. It should be a word that has been in their head for nearly two years and something they should know the answer to when you ask them.

It is really crucial to reward the smallest amount of effort when working with young horses. This is just as important when you are working on teaching them how to stop. The second they stop, give them a pat on the neck. Maybe hop off and then hop back on. Let them stand still for awhile or let them walk. The point is to try and find some type of reward for them. If they feel more comfortable walking around, let that be their reward.

### **Technique #2**

Once you feel like you are making some progress with saying “whoa,” advance to pulling back on the reins. When pulling back, especially with a young horse, always use slow hands. Slow hands = soft mouth. A soft mouth is one of the most important characteristics of a good riding horse. When pulling back, always make sure you accompany it with saying “whoa.” If nothing else, this lets the horse know something is coming. If you’ve mastered the first technique/step, your horse will already stop when you say “whoa.” The pulling back is merely a bonus at this point.

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When pulling back, go straight towards your belt. If your hands can extend past your belt line and the reins are still loose, you probably have too much drape in your reins. It is also in this step that you should back your horse a few steps with each back. Back them each time you stop from this point forward in their training. The backing is what really helps them become lighter on their front end and drop more weight on their haunches. This is the pretty stop we are looking for at the show.

### **Technique #3**

The final two techniques are used primarily when a horse has 60 to 90 days of riding time. That's not to say it can't be used on green horses; it's simply a method that is better for those horses that are ready to go show. At this point, you should have a horse that knows how to stop when you say "whoa" and you pull back on the reins slowly.

For the third technique, replace the pulling back with simply sitting down in the saddle deeper. Sitting down in the saddle deeper doesn't mean leaning back further; it is basically placing more weight down in the seat and sitting on your pockets more. If you have ever seen a reining horse stop, the rider is sitting down deeper in the saddle than they were

when they were loping circles. This is the look we are after. The reason we are sitting deeper and not leaning back as much is that when we sit deeper in the saddle to stop, it places more emphasis on the horse dropping his weight down into his hocks and stopping on his hind end, rather than on his front end. When using this method, don't pull back; only say "whoa" and drop down a little deeper in the saddle.

### **Technique #4**

The final technique/method used when perfecting the stop is to throw your legs forward when you go to stop. Also in this technique, you are not pulling back and not sitting deeper; you are merely saying "whoa" and throwing your legs forward. Just like the other exercises, it must be mastered at the walk first. It is also better if these techniques are done in the round pen or in an arena to minimize distractions for the horse. Keep asking until you get the result you are looking for. There will be some horses that enjoy stopping more than others. If specifically training one for the reining, working cow horse or ranch horse classes, you may want a horse that likes to stop and anticipates the next time he will be stopping. This tells us he enjoys his job and is eager to please.

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## Final Element

Now, let's add all four of these techniques together to come up with the most ideal stop. In all of the techniques we have done up to this point, we have only done two things at once. In each technique/method, we always said "whoa," but we used different means of maximizing our stop.

If your horse has done well at all methods, he is ready for you to use all four methods at once. We have put ourselves in much better position to succeed and lay down a pretty stop where our horse is sitting down in his hind quarters and taking weight off his front end. I have found that most horses enjoy stopping when we teach them this method because they know what's coming and they know what is expected of them. In this method there's no yanking or slamming them into the ground. We have put together a great stop that's done by first saying "whoa" and sitting deeper in the saddle,

throwing the legs forward and finally pulling back with slow hands. The ultimate goal is to not have to pull back at all. In doing so, we have kept our horse's mouth soft and made each maneuver a little easier to accomplish.

As mentioned earlier, everything we do should be perfected at the walk, then trot and then finally the lope. If you're loping circles and your horse isn't stopping very well, the best thing you can do is rewind in your training and work on stopping at the walk and progress forward. These exercises should be repeated several times before you can really expect your horse to do it exactly the way it needs to be done. If you feel you can do it at the trot but are having a difficult time at the lope, try these techniques at the extended trot. With the extended trot, you have added speed but haven't necessarily exceeded the level of difficulty your horse is capable of.

## Walk Them Down

Giving your horse ample time to cool down after a ride is important. During this time you can work on flexing your horse's neck and softening him up one last time before getting off. After your horse has been walked down,

step off before leaving the riding area. This should be followed by loosening the saddle slightly. It is best to tie the horse up for 15 to 20 minutes of additional cool-down time before turning it loose.

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