



## EQUUSOMA® Assignment Instructions

Updated March 2022

The goal of the assignments is to support the integration of what you have learned to date. The assignment for Level 1 and Level 2 is the same: produce either A) a workshop / clinic curriculum or B) a case conceptualization and treatment / service plan (both of which will be the equivalent of 12 hours of service time). The breakdown of time can be however you like; for instance, the curriculum could be for a 2-day workshop, or for three 4-hour modules, etc. For Level 2, you will be revising your Level 1 assignment (or producing a different one, if you wish) to reflect the additional learning obtained by attending the in-person Practical Intensives and completing the sessions and consultations required for Level 2. Additional details about each option are outlined below.

### Assignment Completion Process

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- So that you have as much grounding in the model as possible in order to guide the development of your assignment, please complete the required number of individual case consultations for each level prior to beginning your assignment.
- The more personal Somatic Experiencing® sessions you have completed prior to starting the assignment, the more prepared you will be. However, there is no requirement to have completed a set amount of these sessions prior to starting your assignment.
- Once you have completed your individual case consultations, please reach out to any of the EQUUSOMA® faculty members to begin the process of setting up your consultation group. **Please be advised that there may be delays in beginning the group consultations, since each student is at a different point in their training process.**
- Each faculty member will have slightly different preparation instructions. Typically, the faculty member will ask each group member to submit their draft assignment to them and the other group members a few weeks before the date their assignment will be reviewed by the group. The faculty member and your group members will read through your assignment in advance and will come to the group consultation prepared to discuss your assignment's strengths and provide feedback. Please be sure to ask the faculty member and group members any questions you might have. You do not need to formally "present" your assignment during your assigned group consultation time; everyone will come to the consultation already familiar with your assignment. While there is a required number of group consultation hours allotted for this assignment, many students find that they need additional consultation time to feel confident about their assignment. You are encouraged to book additional consultation time based on your needs.
  - **Note:** your assignment is your intellectual property and no one has the permission to use or distribute it without your written consent.
- Following your group consultation, please revise your assignment with the feedback that was provided to you, and submit it to a faculty member to look over. You will then book an individual consultation with that faculty member for a final review. This can be the same faculty member or someone different to get a different perspective.

Assignments will be submitted in English. Any handouts you plan to use can be in the language in which you plan to deliver your services and do not need to be translated. Instead, please provide a description of your handouts in your assignment if they are in a language in which your faculty member and group members are not fluent.

## **OPTION A: Workshop or Clinic Curriculum**

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Create a curriculum for a workshop or clinic (12 hours total, whether in one installment or as a series of shorter experiences) that incorporates EQUUSOMA® material that you've learned to date. It would be ambitious and likely impossible to include everything you have learned to date in your event; rest assured that this is not the expectation. Rather, focus on creating a curriculum that holds together well and provides a focused experience within which you can hold specific intentions about where you will place your attention.

Titrate what you attempt to include so that the curriculum also reflects your existing capacity. Less is more. What you integrate will also reflect your professional scope of practice, social license to operate, level of familiarity with the material, degree of comfort with somatic/embodiment practices, how far you have gone in your own personal process work, the scope of the curriculum, and your goals for the workshop/clinic. Of course, the participants and horses will also determine how things go as well.

Your curriculum might reflect an entirely new program that you have not yet offered, or might reflect one that you have delivered previously that you are adapting now based on what you are learning in EQUUSOMA®.

Your curriculum outline will include:

- A description of your team members (scopes of practice, roles) and who will be doing what (triangle vs. diamond model of service delivery).
- The equines that you intend to include in the experience (brief background information, if known). Will these be your horses or a facility's horses, or horses belonging to the clinic participants?
- Your target population (describe the clients or participants the curriculum is for).
- Social justice considerations to ensure anti-racist and anti-oppressive practice (this does not mean that you will be teaching clients about social justice themes per se; rather, this is more about how you will consider these pieces when setting up, marketing, and delivering your services to ensure inclusion and address any disparities or privilege that may unintentionally impact the process).
- Your event's scope (Experiential learning? Therapeutic or mental health? Horsemanship skills or riding instruction? Equine behaviour consultation?).
- Your theme(s), focus, intention(s) and/or goals.
- A breakdown of time structure: Consider the order and timing of experiences to support regulation and flow (think of the SE™ sandwich model and the thresholds bell curves) and to scaffold learning and growth. Remember that there will be an overall structure to your event, and then a structure within each segment. Be sure to include the time ranges each day per segment, as well as allowing time to transition between locations / segments (transitions are often the most activating or destabilizing and often require more time than expected in farm settings).
- Preparation/set up, materials, handouts, equipment required, and amount of time allocated for each segment of the workshop (including debrief).
- How the animals' needs will be taken care of before, during and afterwards.
- How the interventions you plan will benefit the animals in terms of their own trauma renegotiation, healing, or relational repair with humans, even if the human(s) are the main "clients".
- How you and your team will be applying the material with one another (the quality of your presence, capacity for flow and co-regulation with one another, the safety of your container).
- A sample promotional flyer for your event.

Your curriculum can be in a table or in a narrative format or a combination. Please be sure to include your references (sources of information). If you are trained in other approaches and wish to include aspects of these in your curriculum, indicate the approach(es) and how you are adapting them based on what you have learned in EQUUSOMA®.

Remember that it's really not about the "activity", but about the process unfolding. However, if you are used to thinking in terms of activities and wish to set up your curriculum with that as a focus, then include how you will address the somatic and relational process unfolding within each activity's structure. Be prepared to let go of the activity or original goal to be with what is wanting to happen next, as we say in SE™. Remember that some nervous systems prefer slow and reflective experiences that are more unstructured, while others prefer more active or dynamic activities with a clear structure. This reflects each nervous system's capacity and window of tolerance (slower nervous systems may have a harder time with speeding up; faster nervous systems may have a harder time with slowing down).

## **OPTION B: Case Conceptualization and Treatment / Service Planning**

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Provide a case conceptualization and treatment / service plan for a human client (e.g., in the context of equine-assisted psychotherapy or learning or therapeutic/adaptive riding) or for an equine client and their owner/rider (e.g., in the context of horsemanship instruction, equine behaviour consultation, equine bodywork, etc.). The case conceptualization and treatment/service plan may describe your proposed plan for a client you have not yet worked with, it may be a summary of services offered to an existing client with whom you are now integrating EQUUSOMA®, or it may be a review of a past client through the lens of what you know now.

**\*\*Note:** you must obtain written consent from the client to disclose anonymized information about their case for the purposes of completing your written assignment. The disclosure consent form must indicate that the written assignment will be shared with the EQUUSOMA® faculty team and with a peer consultation group of no more than 4 other students for review. While this assignment is in the context of a group consultation that will focus on service delivery for that client (in some ways, not much different than a regular case consultation, only more formal with more people providing input and learning from the "case"), the main purpose of the assignment is to support your progression through a professional development program. As a result, even if your client is uncomfortable with the details of your work with them being shared with others, your client might feel obligated to comply with your request so as not to jeopardize their professional relationship with you. Please discuss this with your client and inform them that they are under no obligation to consent to this request and that saying no will not jeopardize your working relationship in any way.

Please be advised that some professional associations and licensing/regulatory bodies have standards of practice or ethical norms around situations like these, to prevent clients from feeling pressured into doing something they are not comfortable with. Please consult your professional association or regulatory/licensing body for additional direction if necessary. **A consent letter template has been included at the end of this document for you to use/adapt as needed.** If there is a possible ethical dilemma involved, you may instead create an entirely fictitious client case, or you might create a composite "client" that may reflect aspects of other cases you have worked with along with fabricated details, with any identifying or unique information altered so as to be unrecognizable in order to preserve confidentiality.

**Part 1)** The case conceptualization will include:

- Your scope of practice (equine-assisted psychotherapy / learning, equine behaviour consultant, horsemanship trainer, riding instructor, equine health practitioner or bodyworker, etc.).
- Description of the client (horse or human), presenting issues, relevant history points and antecedents contributing to the difficulties (if known – these can be recent experiences and triggers, or further back in time), strengths, challenges, and goals for their work with you. If the

client is the horse, include any information you have gathered (from the person's self-report or your observations) about the person that is bringing this horse to you to work with as well as the dynamic between them. **\*\*Note:** proceed carefully in terms of gathering information about the human in the equation, and work within your scope of practice. Informed consent is key.

- Terms, frameworks, and concepts we have covered in EQUUSOMA® so far to frame your understanding of the client, their struggles, and their needs (e.g., trauma lens, neuroception curve, blended states, attachment styles, window of tolerance / faux window, thresholds, stimulus stacking, management strategies, Humane Hierarchy, 5 Domains model of animal welfare, re-enactments, misattunements and co-dysregulation, etc.). Remember, you are not diagnosing but rather providing observations of and theories about what you are noticing from the perspective of what you have learned so far. How does what you have learned help you make sense of what you are observing or sensing about the situation and difficulties at hand?
- Anything that you are curious about that might help fill in the gaps.

**Part 2:** The treatment / service plan will outline the goals that you and the client(s) will be working towards, over the course of the number of appointments you have planned. Please outline:

- Number of appointments and length (totaling 12 hours), location of service delivery (do not list any specific addresses or identifying information), and if you are working with the client's animal(s), your own, or a facility's animal(s).
- A description of your team members (scopes of practice, roles) and who will be doing what (triangle vs. diamond model of service delivery).
- What you intend to work on in the course of those 12 hours, in what order, and how. Specify how you will incorporate EQUUSOMA® theory, principles, and practices or adapt your existing approaches based on what you have learned so far in the program. Indicate what other approaches you intend to weave into the work.
- Provide a description for each appointment, your intentions, any "activities" or techniques intended or used, and how you might structure it or how it unfolded (of course, if you are submitting a proposed plan, be prepared to deviate from it to work with what actually happens – EQUUSOMA® is not a "manualized" approach, so this set up is strictly for the purposes of completing the assignment). If doing a review of past work previous to learning EQUUSOMA®, describe each previous session through the lens of what you are learning in the training and through your personal sessions and consultations (what are you curious about now, what might you explore differently?).
- Social justice considerations to ensure anti-racist and anti-oppressive practice (this does not mean that you will be teaching clients about social justice themes per se; rather, this is more about how you will consider these pieces when setting up, marketing, and delivering your services to ensure inclusion and address any disparities or privilege that may unintentionally impact the process).
- If writing about an actual client case, please let them know that you will be providing a copy of their signed disclosure consent form to the faculty member leading your consultation group as well as EQUUSOMA® founder, Sarah Schlote, for the purposes of accurate documentation. **Do not provide the disclosure consent form to the students in your consultation group as this will breach confidentiality.**
- Preparation/set up, materials, handouts, and equipment required.

- How the animals' needs will be taken care of before, during and afterwards.
- How you and your team will be applying the material with one another (the quality of your presence, capacity for flow and co-regulation with one another, the safety of your container).

## Review of EQUUSOMA® Concepts

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The following is a summary of key concepts that are covered in the training modules covered to varying degrees, to help prompt your creative process. This is not an exhaustive list; there may be other content from the training that you opt to include in your assignment. If you are a Level 1 student, some of these concepts may not be covered until Level 2; please focus on what you know to date.

- **Somatic Experiencing®:** Setting the conditions, activation cycle, tracking (mindful witness), sensation language, SIBAM, over- and under-coupling, titration, pendulation, trauma vortex/counter-vortex, thresholds, containment, expansion-contraction, cultivating felt sense resources, orienting, sandwich model, renegotiation, working through the biological completion of thwarted self-protective responses, boundary repair work, joining vs merging/disconnecting
- **Polyvagal theory:** Neuroception of safety, danger, life threat; 3 branches / "dials" (sympathetic nervous system, ventral vagal complex, dorsal vagal complex); blended states
- **Ethology and welfare:** Understanding equine and human health and behaviour under natural conditions; recognizing the impact of "captivity conditions" (adversity / trauma) on horses and humans; holding a trauma lens on behaviour; recognizing myths and misperceptions about humans and horses; Five Domains Model
- **Trauma-informed care principles:** Safety, consent, choice, voice, empowerment/agency, trust, collaboration, compassion, safe and effective use of self
- **Interpersonal / interspecies neurobiology:** Triune brain, brain in the palm model, window of tolerance, "faux window", social coherence, co-regulation/co-dysregulation, entrainment, emotional contagion
- **Attachment theory and relational dynamics:** Secure / earned secure attachment, insecure attachment, supporting conditions for feeling safety in relationship, growing capacity in the body for connection, recognizing and interrupting re-enactments of trauma patterns, awareness of self and other (intersubjectivity), attunement, "being seen and heard, feeling felt, and getting gotten", relationship as a developmental process
- **Equitation science:** Humane Hierarchy, LIMA principle (Least Invasive, Minimally Aversive), arranging the antecedents before proceeding with interventions, ethical use of reinforcement methods

## Sample Disclosure Consent Letter Form

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Dear [client name],

I am currently a student in the EQUUSOMA® Horse-Human Trauma Recovery training program. As part of the program requirements, I must complete an assignment at the end of Level 1 and Level 2. One of the assignment options is providing a written case conceptualization and treatment plan [or service plan] for a client (horse or human) in the context of my professional work.

The case conceptualization and plan will include background information about the human, horse, or human-horse pair, presenting difficulties and goals coming up, as well as a description of 12 hours' worth of service delivery demonstrating how I have integrated [or plan to integrate] what I am learning in the course of the training [or, reviewing our past work from the standpoint of what I am learning now]. The written assignment will be shared with a group of no more than 4 other students in the program, a faculty member, and EQUUSOMA® founder, Sarah Schlote, for the purposes of obtaining input and guidance to support my learning in service of my commitment to providing quality care.

No identifying information will be included in order to preserve your anonymity. The other students in the group as well as the program faculty will not share my assignment or use it for their own purposes. All individuals in the EQUUSOMA® program (teaching team and students) have signed an agreement to maintain confidentiality about any information disclosed to them in the course of their involvement in the EQUUSOMA® program.

You are under no obligation to agree or consent to me using our work as the focus of my assignment. Your confidentiality and your right to self-determination and agency are paramount, and you may decline this request without any concerns that saying no will negatively impact our working relationship. Alternatively, you are also allowed to say yes now, and later decide to change your mind and revoke your consent before I have submitted my assignment.

Your signed disclosure below will only be shared with the faculty member and Sarah Schlote to ensure that I have met ethical guidelines in completing this assignment. Your name [and/or the name of your horse, if working with the client's horse] will be changed to further conceal your identity.

### Client disclosure consent - Please sign one of the following:

I, \_\_\_\_\_ (client name) have read this letter and discussed it directly with \_\_\_\_\_ (your name). My questions have been answered and my concerns, if any, have been addressed. I feel comfortable proceeding and am consenting for my work with \_\_\_\_\_ (your name) to be included for the purposes of this assignment as described above. I offer this consent voluntarily, knowingly, and intelligently.

Client signature: \_\_\_\_\_ Date: \_\_\_\_\_

**OR:** I **do not** consent for my information to be used for the purposes of this assignment.

Client signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Resources

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### **EQUUSOMA®**

Some of the book chapters that have been published related to EQUUSOMA® are available for download for free at <https://equusoma.com/publications/>

You are welcome to make use of EQUUSOMA® handouts provided during the training in your assignments, along with the Freesources on the EQUUSOMA® website. You may refer to any of the required and suggested readings as well as other relevant publications or materials.

The Tiger Talk blog may also be of interest: <https://equusoma.com/blog/> as well as the podcasts page: <https://equusoma.com/podcasts/>

### **Somatic Experiencing® International (SEI)**

SEI has a number of pages of resources on its website that includes a number of published theory and practice articles and research studies that may be of interest (at least two are around including SE™ in group settings). There are other topics of interest as well.

<https://traumahealing.org/se-101/>

<https://traumahealing.org/se-research-and-articles/>

<https://traumahealing.org/scope/>

<https://traumahealing.org/anti-oppression-resources/>

<https://traumahealing.org/conversations/>

### **Twig Wheeler**

Twig Wheeler is a Somatic Experiencing® Practitioner who has prepared two video series on how to integrate SE™ further into professional work with clients. While his video series are not directly relevant to the written assignments per se, they may provide support with things like how to structure sessions, becoming familiar and comfortable with somatic language and inquiry, and so on. <https://www.se-reflections.com/offerings/>

If you have any questions, please feel free to reach out to any EQUUSOMA® faculty member or faculty-in-training for support.

Have fun!