

# Utilizing Tracking Systems to Establish and Maintain Sustainable Equine Working Conditions

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Michelle Haury ATRI and  
Liz Zelles CTRI



# Michelle Haury

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- ATRI, ESMHL, Mentor
- Has worked at We Can Ride since 2012
- Currently Education Manager at We Can Ride
- BFA University of GA
- Grew up on a Saddlebred farm in Georgia with lovely Mama horses and their babies and showing Saddleseat. She loves dressage now



# Liz Zelles

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- CTRI since 2021
- Completing Bachelors of Science in Equine Management at UW River-Falls in Spring 2026
- Extensive background in dressage riding and learning theory
- Has worked at We Can Ride since January 2024



# What We Do

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- This system tracks horses work level on a day-to-day basis and on a session basis
  - Aids in a comprehensive succession plan (onboarding and discharging clients and horses), tracks horse's tolerance of work
- Why? Removes emotion from decision making and uses trends to make decisions easier
- Challenges:
  - Adds to daily paperwork (approximately 1.5 hours of additional paperwork each week)





# Weekly Horse Goes

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- Used to track weekly use in classes and conditioning/bootcamping
  - C = Conditioning: improving or maintaining physical fitness and/or mental health
  - BC = Bootcamping: Training related to therapeutic riding or hippotherapy
  - E = Enrichment: Bodywork, toys, or games used to improve or maintain mental health
  - TR = Therapeutic Riding
  - H = Hippotherapy
  - G = Ground work
  - V = Volunteer lesson
  - EAL = Equine Assisted Learning
  - HD = Herd Dynamics
- Comments are included to note vet work, farrier work, or chiropractor visits




# Weekly Horse Goes Chart

WEEK TWO Jan 10, 11, 12, 13, 14, 15, 16									Did the horse have soft/loose poops and how many times?	Notes	Instructor Color Tab	MICHELLE	KRISTY
Horse	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Total Class/C				LIZ	TABEA
Billy		1 HD		1 HD	1 V			2/0				HEATHER	JODI
Buck	1 TR	2 TR, 1 HD	1 TR	1 HD	1 TR		1 C	7/1				NATALIE	EMMA
Chilly	1 TR	1 TR 1 C	1 TR	1 C		1 C	1 C	3/4				LIZ Z	WANDA
Dakotah													
Diego	1 TR	1 TR, 1 HD	1 TR			1 H	1 C	5/1					
Gio	1 TR	1 TR, 1 HD	1 TR	1 C	1 V			4/1					
Gus				1 HD	1 G		1 C	2/1					
Henry	1 C	1 C	1 G			1 C	1 C	0/5					
Junior	1 BC	1 BC	1 V	1 C			1 C	1/4					
Klara	1 TR		1 V	1 HD & 1 C	1 V	1 H		4/1					
Koal	2 TR	1 TR, 1 HD	1 V	1 HD	1 TR		1 C	7/1					
Kota	1 TR	1 TR	1 TR	1 V	1 V		1 C	4/1					
McDreamy	1 TR	1 TR		1 C	1 TR		1 C	3/2					
Mitch													
Nova		1 HD	1 V	1 HD 1 BC	1 G		1 C	4/2					
Richie	1 BC	1 BC		1 BC 1V			1 C	1/4					
Romeo													
Tawny				1 C, 1V		1 C	1 C	1/3					

# Weekly Horse Goes Documentation

Total Goes Weekly									Horse Conditioning				
WEEK ONE Jan 3, 4, 5, 6, 7, 8, 9									Did the horse have soft/loose poops and how many times?	Notes	Instructor Color Tab	MICHELLE	KRISTY
Horse	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Total Class/C				LIZ	TABEA
Billy					1 V			1				HEATHER	JODI
Buck	1 TR				1 TR			2				NATALIE	EMMA
Chilly	1 TR	1 TR	1 TR				1 C	3/1				LIZ Z	WANDA
Dakotah										1/8 Dr. Khule, ultrasound, cervical exam			
Diego	1 TR	1 TR	1 TR			1 H		4					
Gio	1 TR	2 TR	1 TR	1 V	1 VG			6					
Gus							1 C			1/8 bilateral stifle injections. Stall rest 24 hours, can start exercise 3-5 days			
Henry					1 C/BC		1 C			Hand walked in indoor for 15 min over ground poles			
Junior		1 BC	1 V				1 BC						
Klara	1 TR	1 TR	1 VG		1 V	1 H							
Koal	1 GW	1 TR	1 V										
Kota	1 TR		1 C	1 V	1 V								
McDreamy		1 TR			1 TR			2					
Mitch	1 BC					1 BC		2 BC		Got injections at the end of Dec			
Nova			1 VG					1					
Richie		1 BC			1 BC		1 BC	3 BC					
Romeo													
Tawny				1 V			1 C	1/1		Started ulcer meds last week of DEC/1st week of Jan			


**Liz Zelles**  
 4:41PM Jan 9

Hand walked in indoor for 15 min over ground poles

Reply or add others with @

# Well-being scores

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- Total Well-Being Score
  - Shows the overview of the session on a weekly basis, allowing to see trends
  - What we do with the information
    - Determine if the workload is too much or if there is a health issue that needs to be addressed



# Daily Well-Being Scores

		WEEK TWO Jan 10, 11, 12, 13, 14, 15, 16														
Saturday AM		Liz Z														
CRITERIA on a scale of 1-5, 0 being no issues, 5 being worst of the worst																
Time	Horse	Type of Lesson	Tolerates rider as usual	Lameness	Skin Issue (Include info in notes)	Spooking	Biting/Mouthy	Girthy	Energy Level	Willingness to move forward	Mounting Behavior	Tail swishing	Total	JIM Score	Horse Skills That Need To Be Worked on	NOTES
<b>10-10:45 AM</b>													0			
Gabby	Chilly	TR											0			
Amelia	Klara	TR						2					2			
Billy	Buck	TR											0			
													0			
<b>11-11:45</b>													0			
Benny	McDreamy	TR											0			
Justin	Diego	TR								3	2		5			Backed out of mounting area
Nora	Kota	TR											0			
													0			
<b>12-12:45 PM</b>													0			
James C.	Klara	TR											0			
Maggie	Koal	TR							3				3			
													0			
													0			
<b>1:15-2:15</b>													0			
Carlos	Gio	TR	2										2			
Ronan	Kota	TR											0			
													0			
													0			
<b>2:30-3:15</b>													0			
Harper	Koal	TR											0			
													0			
													0			





# JIM Scores

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- The Jim in JIM Scores!
- Activities of Daily Living adjusted for Therapeutic Riding



# JIM Score Criteria

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Client	Criteria	Score
	Weight (Individual)	
	Tangible Anxiety (15)	
	Very little participation (5)	
	Low safety awareness (5)	
	Tight Legs (5)	
	Vocalization (5)	
	Crooked/Unbalanced (10)	
	Crest Mount (10)	
	Crest Dismount (10)	
	Difficulty to Mount (10)	
	Physical holds needed (10)	
	Regular Seizures w/ moderate/maximum motor activity (10)	
	Abnormal seated position - Chair seat, Legs up, uneven hips (10)	
	Strong or Violent Emotional Outburst (10)	
	Inability to assist with repositioning (10)	
	Client Exhibiting Pain When Riding (10)	
	Spasticity (15)	
	Wiggling/Bouncing/Flapping (15)	
	Leaning forward/Back/Side (15)	
	Hitting, kicking, spitting, hair pulling, scratching, screaming, pushing, removing helmet, self-dismounting, unruly parent (≤ 15 or failure)	
	Lack of Neck Control (Fail)	
	Non-weight Bearing (Fail)	
	<b>Total</b>	<b>0</b>

# JIM Score Per Class

Saturday							
Weight	Rider	Horse	Level of Class (Score)	Type of Class (Score)	# of Sidewalkers (Score)	Client Score	Total Score
115	Billy	Buck	20	30	20	140	210
52	Gabby	Chilly	20	30	20	65	135
51	Amelia	Klara	20	30	20	90	160
						0	0
Weight		Horse	Level of Class (Score)	Type of Class (Score)	# of Sidewalkers (Score)	Client Score	Total Score
60	Benny	McDreamy	20	30	20	50	120
64	Justin	Diego	20	30	20	65	135
104.5	Nora	Kota	20	30	20	45	115
						0	0
Weight	Rider	Horse	Level of Class (Score)	Type of Class (Score)	# of Sidewalkers (Score)	Client Score	Total Score
103	James C	Klara	15	15	20	110	160
115	Maggie	Koal	15	15	20	40	90
						0	0
						0	0
Weight	Rider	Horse	Level of Class (Score)	Type of Class (Score)	# of Sidewalkers (Score)	Client Score	Total Score
125	Ronan	Kota	15	15	0	20	50
96	Carlos	Gio	15	15	0	10	40
						0	0
						0	0
Weight	Rider	Horse	Level of Class (Score)	Type of Class (Score)	# of Sidewalkers (Score)	Client Score	Total Score
90	Harper	Koal	20	10	20	120	170
						0	0
						0	0
						0	0

Score Tables				
Level of Class	Score		Weight	Score
Groundwork	10		≤50	3
	1/2	20	51-80lbs	5
	3	15	81-100lbs	10
	4	15	101-125lbs	15
Volunteer lesson		15	126-140lbs	20
			141-150lbs	25
			151-160lbs	30
Private		10	161-170lbs	35
Semi Private		15	171-180lbs	40
3 Riders		30	181-195lbs	50
4 Riders		40		
Hippotherapy		20		
# of Sidewalkers	Score			
	1	10		
	2	20		

# Master JIM Scores

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Horse	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Total	Suggested Score
Billy					25			25	50
Buck	210	135	45		150			540	580
Chilly	135	118	73					326	425
Dakotah								0	
Diego	135	70	90			83		378	400
Gio	40	75	80		25			220	350
Gus								0	
Henry			70					70	150
Junior			25					25	100
Klara	320	113	25		25	132		615	650
Koal	260	45	25		90			420	500
Kota	165	160	60	25	25			435	475
McDreamy	120	166			105			391	430
Mitch								0	
Nova			25					25	100
Richie				25				25	100
Romeo								0	
Tawny				25				25	100

# JIM Score Interactive Activity

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- Create a client score for each rider in each video
  - How do you think this could be used for your clients?
  - Are there criteria you feel are not applicable? Do you think there is anything missing criteria-wise?
- Sheila: Weight of 135lbs
- Kristy: Weight of 140lbs



# Maintaining communication

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- Daily horse/client updates
  - Sent to: Instructors, barn aids, executive director, volunteer coordinator, horse manager, and education manager
- Used to maintain open communication for daily updates on horses and clients





# Succession Planning

- How JIM scores help with onboarding clients
- How JIM scores help with discharging clients

Horse	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Total	Max Score	Suggested Score
Billy					25			25	25	50
Buck	210	135	45		150			540	210	580
Chilly	135	118	73					326	135	425
Dakotah								0	0	
Diego	135	70	90			83		378	135	400
Gio	40	75	80		25			220	80	350
Gus								0	0	
Henry			70					70	70	150
Junior			25					25	25	100
Klara	320	113	25		25	132		615	320	650
Koal	260	45	25		90			420	260	500
Kota	165	160	60	25	25			435	165	475
McDreamy	120	166			105			391	166	430
Mitch								0	0	
Nova			25					25	25	100
Richie				25				25	25	100
Romeo								0	0	
Tawny				25				25	25	100

Questions,  
comments,  
suggestions?

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