



EQUUSOMA[®]

HORSE-HUMAN TRAUMA RECOVERY

EQUUSOMA[®] POLICIES HANDBOOK

Student and Practitioner Edition

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The EQUUSOMA® Policies Handbook – Student and Practitioner Edition (September 27, 2023 Revision) is intended to support you as you navigate and complete the training process and integrate EQUUSOMA® into your scope of practice. *****This revised edition replaces the previous edition from October 2022.***

Various individuals have supported and/or reviewed the development of these guidelines, including:

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- Legal counsel for the Schlote Psychotherapy Professional Corporation

EQUUSOMA® trainings are offered with the licensing permission of Somatic Experiencing® International. The two programs are independent from one another. Some EQUUSOMA® students may choose to undertake the SE™ training program either concurrently or at a later time, but there is no requirement that EQUUSOMA® students also be registered in SE™ training.

PREAMBLE

EQUUSOMA® students and Practitioners agree to abide by all EQUUSOMA® and Schlote Psychotherapy Professional Corporation policies, procedures, and guidelines as posted on the website at <https://equusoma.com> and included in this most current revision of the Policies Handbook, which are subject to change. The present version of Policies Handbook replaces previous editions or policies, and students and Practitioners are bound by all current program policies, procedures, and guidelines, whether listed herein or elsewhere. Notice of changes to policies may be communicated via email, the EQUUSOMA® website, and/or via regular public means including social media. Students and Practitioners agree that such postings and/or email communications shall be sufficient notice of any changes to our policies, procedures, and guidelines. It is each student and Practitioner's responsibility to check the website, social media, and/or regular public postings for updates.

Additional terms and conditions pertaining to EQUUSOMA® students and Practitioners, as well as team members, can be found in the EQUUSOMA® Student and Practitioner Agreement (currently on the website) and in the EQUUSOMA® Code of Ethics (on the website once released).

This Policies Handbook shall be deemed to be part of the Student Agreement, and together form one legally binding document. To the extent the terms of the Student Agreement and this Policies Handbook conflict, the Policies Handbook terms shall prevail. To the extent the terms of the Policies Handbook and terms on the EQUUSOMA® website at <https://equusoma.com> conflict, the terms of this Policies Handbook shall prevail.

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Welcome to the Herd!

We are excited to support you on this journey of personal growth, nervous system transformation, and professional development.

As has often been said, you can't think your way out of trauma. EQUUSOMA® cannot be integrated through top-down instruction alone. The teachings really only come alive through the experiential practices that support their embodiment through the felt sense. This is because EQUUSOMA® is phenomenological in focus, working with the complex and nuanced relational, behavioural, and autonomic sequences that are playing out in equines and humans in real time.

EQUUSOMA® is not a singular technique or an approach per se, and is not intended to replace other approaches found in equine-assisted psychotherapy and learning, horsemanship, horse training, equine behaviour consultation, riding, equine bodywork, animal communication, and so on. Instead, EQUUSOMA® is a different paradigm altogether that goes beyond behaviourism and provides a new lens through which to view all of the above and adapt existing approaches.

EQUUSOMA® cannot be taught in a weekend or all at once. It is not a training that will teach you a set of techniques and mechanical protocols to apply in a linear fashion. There are no quick fixes when it comes to trauma, and unlearning old ways and building new neural foundations in people and equines takes time. With this in mind, EQUUSOMA® teaches a number of maps to help you navigate complex terrain. These frameworks and their principles and concepts can guide the repair of relationships, support the repatterning of the nervous system, and facilitate relational and biological renegotiation for humans and equines in a variety of contexts and scopes of practice.


As a result, it is impossible to get a sense of the full picture of the EQUUSOMA® paradigm after only one module or even after Level 1. Each Theory Module and Practice Module build on one another, creating scaffolding that slowly helps grow student capacity for the teachings that will come next. Level 1 provides students with ingredients, and Levels 2 and beyond cover progressively more complex recipes, in parallel with the personal sessions of Somatic Experiencing® that students must complete in support of their own nervous system healing. The case consultations and assignment consultations also allow students to further integrate EQUUSOMA® into their respective scopes of practice.

The EQUUSOMA® model and curriculum are perpetually growing, given ongoing developments happening in ethology, neuroscience, psychology, psychophysiology, equitation science, interspecies neurobiology, comparative psychology, trauma treatment, and the overall evolution in social and spiritual consciousness. The EQUUSOMA® training will reference the scientific literature where known and relevant. However, the EQUUSOMA® training is deeply experiential, and students are not expected to retain heady neuroscience in order to proceed through the modules. There are no formal tests or exams, just reconnecting with what it is to be a mammal in these times and what is needed to be more fully alive.

Embarking on the EQUUSOMA® journey involves commitment and investment on multiple levels. It is as much about the student's healing and transformation as it is about supporting the same for the equines and people they work with. Unwinding the complexity of this process ultimately leads to ease and simplicity.

We're glad you are here.

Sarah Schlote and the EQUUSOMA® team



TRAINING PROGRAM INFORMATION

EQUUSOMA® Training Process

As the model evolves, additional levels may be added to support deeper integration of the material and to cover relevant topics pertaining to equine-human trauma recovery. The following is current as of September 2023.

STEPS		WHAT'S INVOLVED	
Level 1 (Entirely online)	Training Components	<ul style="list-style-type: none"> Theory Module 1 (video) Theory Module 2 (video) + Practice Module 1 (live online) Theory Module 3 (video) + Practice Module 2 (live online) Bonus Features (live Q&A and Demonstrations) 	
	Additional Requirements	<ul style="list-style-type: none"> 10 personal sessions of SE™ 6 case consultations 4 assignment consultations Submission of signed log sheets and assignment 	
Level 2 (Online and in person)	Training Components	<ul style="list-style-type: none"> Theory Module 1 (video) Practice Module 1 (in person with equines) Theory Module 2 (video) Practice Module 2 (in person with equines) 	
	Additional Requirements	<ul style="list-style-type: none"> 5 personal sessions of SE™ 6 case consultations 2 assignment consultations & 1 assignment review Submission of signed log sheets and assignment 	
Level 3+	<i>In development</i>		
<p>The number of credit hours listed here is the minimum required. Some students complete more based on their needs. As such, the number of hours involved in the program may vary per student.</p>			
Required Readings	<ul style="list-style-type: none"> <i>Waking the Tiger</i> (Levine) <i>In An Unspoken Voice</i> (Levine) <i>Nurturing Resilience</i> (Kain & Terrell) <i>Horses in Company</i> (Rees) <i>Equus Lost?</i> (De Giorgio & De Giorgio-Schoorl) Language Signs and Calming Signals of Horses (Draaisma) Additional readings as indicated 		Testing of knowledge from readings is not required at this time. Your honesty about the completion of readings is trusted and appreciated. In future, there may be a short exam on content covered in the readings. Certain readings are optional; these will be indicated during the training.
Scope of Practice Statement	You are required to complete a scope of practice statement outlining your credentials, training, experience, populations you are qualified to work with, issues you are qualified to address, and populations/issues that are beyond your scope of practice. This statement will be included on your website (if applicable) and in your informed consent form or service agreement form.		
Signed EQUUSOMA® Code of Ethics / Guidelines	These ethics and guidelines set out basic principles for EQUUSOMA® community members regarding the minimum expected requirements. They are not intended to replace other codes of ethics and standards that you may be obligated to abide by within your scope of practice; rather, they are intended to be used in combination with those.		
Faculty Recommendation	1 letter of recommendation from an EQUUSOMA® faculty member		
<p>The ESP designation is achieved when all these requirements are met.</p> <p>Due to the experiential and individualized nature of the EQUUSOMA® training, students may be required to complete additional steps before achieving a particular training level or completing the entire process and obtaining the EQUUSOMA® Practitioner designation. Progression through the steps as outlined (which may be subject to change) is not a guarantee of completion, as every student will integrate the material at different rates based on their nervous system and learning capacity. Any additional requirements will be considered on a case-by-case basis to support individual needs.</p>			

1

Level One

Level 1 is entirely **ONLINE**. The Theory Modules must be completed before attending the live online Practice Modules in real time in the order indicated. The Bonus Features can be attended live or by watching the recordings.

Theory Module 1:

Access to self-paced, pre-recorded videos starts annually in January

+ BONUS FEATURES *

Theory Module 2:

Access to self-paced, pre-recorded videos starts annually in March

+ BONUS FEATURES **

Theory Module 3:

Access to self-paced, pre-recorded videos starts annually in September

+ BONUS FEATURES **

PRACTICE MODULE 2
Attend live online in real time, in Dec. or January

PRACTICE MODULE 1
Attend live online in real time, in July or August

BONUS FEATURES: *Live Q&A once a month. **Live Q&A + Demonstration once a month

CERTIFICATE TRACK REQUIREMENTS

LEVEL 1 CERTIFICATE OF COMPLETION

10 Personal SE™ Sessions

6 Case Consults

4 Assignment Consults

Submit Assignment & Signed Log Sheets

We recommend that you space your required hours throughout the course of Level 1 to receive maximum benefit as opposed to waiting until the end of each level. Case consults should be completed prior to beginning the assignment draft and consults.

2

Level Two

Level 2 is a mix of **ONLINE** and **IN PERSON**. The Theory Modules must be completed before attending the live in-person Practice Modules in the order indicated. The Practice Modules are currently offered at farms in Canada, the US, France, and Australia. Students must attend both Practice Modules at the same location.

Theory Module 1:

Access to self-paced, pre-recorded videos starts at different times based on cohort location

Theory Module 2:

Access to self-paced, pre-recorded videos starts after Practice Module 1

PRACTICE MODULE 1
Attend live in person; dates vary by location

PRACTICE MODULE 2
Attend live in person; dates vary by location

CERTIFICATE TRACK REQUIREMENTS

LEVEL 2 CERTIFICATE OF COMPLETION

5 Personal SE™ sessions

6 Case Consults

2 Assignment Consults

Complete Final Review then Submit Assignment & Signed Log Sheets

We recommend that you space your required hours throughout the course of Level 2 to receive maximum benefit as opposed to waiting until the end of each level. Case consults should be completed prior to beginning the assignment draft and consults.

ESP

EQUUSOMA® Practitioner Designation (ESP)

Level 1 Certificate Complete

Level 2 Certificate Complete

Final ESP Requirements

- Completion of Required Readings
- Submission of Scope of Practice Statement
- Signed Code of Ethics
- Faculty Letter of Recommendation
- See policy manual for any additional requirements, if applicable

ESP DESIGNATION

Level 1 Training Components *(Entirely Online)*

The following description of Level 1 is not exhaustive and is meant as an overview.

The Level 1 training takes place entirely online, via a mix of recordings and live components. Students must finish watching the pre-recorded Theory Modules by the stated deadlines in order to attend the live experiential Practice Modules in real time. Aspects of these Practice Modules take place in breakout rooms on Zoom and are not possible to record.

LEVEL 1 ONLINE				
January-March	April-June	July-August	September-November	Dec-Jan
Theory Module 1 + Bonus Features	Theory Module 2 + Bonus Features	Practice Module 1	Theory Module 3 + Bonus Features	Practice Module 2

Theory Module 1

[formerly called Fundamentals I]

***By pre-recorded video.** This module is the starting point for all students in the EQUUSOMA® training program. The module provides an overview of EQUUSOMA® as part of the current paradigm that is moving beyond behaviourism, which looks at the intersections of equine trauma and human trauma in various contexts, such as equine-assisted/facilitated psychotherapy and learning (EAPL), horsemanship, equestrian disciplines, therapeutic or adaptive riding, horse training, equine behaviour consultation, equine veterinary care, equine bodywork, and animal communication, etc.

The module will introduce trauma-informed principles and how to consider the equine in a reciprocal relational process through various maps and frameworks. Human trauma recovery will be explored as central to supporting trauma recovery in equines, as will recognizing re-enactments and setting the foundation for renegotiation and repair. Students will learn about:

- An overview of the program as a whole
- Phenomenology, foundational values, and guiding principles
- Trauma-informed service principles for equines and humans
- Mammalian ethology, physiology, and the activation cycle
- Adversity, trauma, and management strategies in humans and equines
- The impact of captivity conditions on health, behaviour, relationships, and overall functioning
- Shifting from re-enactments to renegotiation
- Animal welfare and the 5 Domains model
- The importance of setting different environmental and relational conditions that promote a neuroception of safety for equines and humans.
- The window of tolerance and “faux window” model
- Stimulus stacking, allostatic load, completing pendulations, and the Core Response Network
- Thresholds and ways to grow the window of tolerance
- Relevant neuroscience and neurobiology (including but not limited to the polyvagal theory as well as the current state of the scientific debate surrounding it)
- Adapting the Humane Hierarchy and LIMA based on the material to date

EQUUSOMA® is framed within a trauma-informed social justice perspective that acknowledges the stacked experiences of adversity on the nervous systems and relational experiences of different groups of people and equines. Scope of practice considerations will also be discussed.

Bonus Features:

- 3 one-hour live Q&A meetings, occurring once a month from January to March

Theory Module 2

[formerly called Foundations of SE™]

***By pre-recorded video + live Practice Module 1.** This module offers an introduction to the Somatic Experiencing® method of trauma resolution as a bottom-up approach to supporting trauma recovery. SE™ trauma resolution methodology as taught in EQUUSOMA® focuses on interspecies relational attunement and the re-patterning of human and equine nervous systems to support the deactivation and discharge of allostatic load, greater resilience in the nervous system, and capacity for aliveness and connection. Our presentation of core SE™ principles and practices will be framed within a social justice and decolonizing perspective that recognizes how SE™ relational and body-oriented methods stem from millennia of animal experiences and certain traditions of Indigenous peoples around the world, grounded in ethology and Western science. The topics of transference and counter-transference in equine-human contexts will also be explored.

Students will learn about various concepts that are core to the SE™ model, applied to humans and to equines, including but not limited to:

- Attunement, presence, and joining (vs. disconnection and merging)
- SIBAM (sensation, image, behaviour, affect, and meaning)
- Coupling dynamics
- Somatic inquiry, sensation language, invitational language
- Nervous system tracking
- Titration and thresholds
- Containment
- Pendulation
- The trauma vortex and counter-vortex
- Expansion and contraction
- The sandwich model
- Defensive and exploratory orienting
- Biological completion
- Application of SE™ to equines and humans, and in equestrian trauma
- Adapting the Humane Hierarchy and LIMA based on Module 2

Bonus Features:

- 3 two-hour meetings, with live Q&A and demonstrations, occurring once a month from April to June

Practice Module 1: The experiential Practice Module attached to Theory Module 2 will allow students to meet in real time with other students, training assistants, and a faculty member to deepen the integration of the learning to date. The Practice Module will feature the following:

- **Daily Home Herds:** Meeting with a smaller group of students and an assigned training assistant as a landing strip and a place to share and voice questions and needs, in breakout rooms on Zoom. The Home Herds also allow students to explore the somatic experience of forming a “herd” on a relational level, tracking the felt sense and gently reconnecting with the rhythms of their animal bodies.
- **Practice Rounds:** Experimenting and playing with the principles and concepts in relation to human nervous systems in breakout rooms on Zoom, in small groups with the support of a training assistant. Each practice round will consist of a student in the practitioner role, a student in the “lender” role (lending their nervous system for the practitioner to learn to attune to and work with), and one or more active observers.
- **Debriefing and Discussion:** There will be opportunity for the small groups to debrief together following each practice round, as well as time to come together as a large group for debriefing and discussion more broadly. Some questions that are raised in the breakout groups will be brought to the large group for the faculty member to respond to, so that everyone can benefit.

Theory Module 3

[formerly called Fundamentals II]

***By pre-recorded video + live Practice Module 2.** This module delves more deeply into the topics covered to date in the previous Theory Modules and Practice Module. In particular, students will learn about additional nuances related to the following topics:

- Equine ethology and captivity conditions
- Equine perception and neuroception
- Shock and developmental trauma
- Attachment theory, the human-animal bond, and attachment related to humans and equines
- Boundary and relational rupture and repair
- A trauma lens on behaviour
- Entrainment, emotional contagion, coregulation, and coherence
- Limbic remodelling
- Biological completion and dyadic completion
- Touch and equines
- Revisiting common practices, methods, and beliefs through an EQUUSOMA® lens
- Safe and effective use of self, and social license to operate
- Adapting the Humane Hierarchy and LIMA based on Module 3

Bonus Features:

- 3 two-hour meetings, with live Q&A and demonstrations, occurring once a month from Sept. to Nov.

Practice Module 2: The experiential Practice Module attached to Theory Module 3 will allow students to meet in real time with other students, training assistants, and a faculty member to deepen the integration of the learning to date. The Practice Module will feature the Home Herds, Practice Rounds, and Debriefing and Discussion mentioned previously.

NOTE:

- Students are encouraged to consider how to apply the material in their respective scopes of practice. Not all techniques and concepts will be appropriate for all students in all contexts.
- Themes and topics are generally introduced in the order listed above, with some variations. Subsequent modules refer to and elaborate on material covered in previous modules.

SAMPLE DAILY SCHEDULE FOR LEVEL 1 PRACTICE MODULES		
The following breakdown is based on when the Practice Modules are offered from 7am to 2pm. Sometimes, the modules are offered at a different time to accommodate students in different time zones. The breakdown below is based on the 7am-2pm offerings. The schedule and when experiential breakout groups take place may differ for the cohorts taking place at other times.		
Times	Focus	Notes
7-8:30am	On Day 1: Orientation, introductions, housekeeping, setting up practice rounds On Days 2-4: Orientation, large group discussion and review (as necessary), setting up practice rounds. Practice rounds begin.	This schedule is subject to change based on the flow and needs of the group, length of the demonstrations and debriefing, and the length of the practice rounds. The timing and length of breaks may vary.
8:30-8:45am	Break (15 min)	
8:45-10am	Practice Rounds and/or large group discussion	
10-11am	Long Break (60 min)	
11-12:30pm	Practice Rounds and/or large group discussion	
12:30-12:45pm	Break (15 min)	
12:45-2pm	Practice Rounds and/or large group discussion. Home Herds from 1:30-2pm for remaining 30 min.	

Level 2 Training Components *(Online and In Person)*

The following description of Level 2 is not exhaustive and is meant as an overview. Depending on the cohort, the material covered in Practice Modules 1 and 2 may shift (or be introduced in the opposite module) in response to the needs and variables in play.

The Level 2 training is a mix of online (pre-recorded) video modules and live, in-person Practice Modules with equines. Students must finish watching the pre-recorded videos prior to attending the Practice Modules. Any make-up time must be completed prior to the next module. Delays in completing any portion of Level 2 may result in delays in progressing through the program.

Theory Module 1

***By pre-recorded video.** Theory Module 1 covers key concepts and content that will help prepare students for in-person Practice Module 1. Given the different variables that are present in each Level 2 cohort at each location, the Practice Modules vary somewhat in how they unfold. As such, the content of the Level 2 Theory Modules may also vary accordingly and consist of a review of key concepts, a deepening of topics covered in Level 1, and new material not previously explored.

Theory Module 1 will also cover what to expect at a Practice Module and the roles of assistants and students during practice rounds with equines, as well as transference and counter-transference. Common topics for the Level 2 Theory Modules are outlined at the end of this section.

Practice Module 1

[formerly called Practical Intensive I]

***Live in person.** This is the first time EQUUSOMA® students and training team members will have a chance to meet in person with equines. The first day begins with a land acknowledgment where applicable, an orientation to the setting, the team, the students, housekeeping, the schedule, the goals for the Practice Module, and student intentions for learning. Students will also orient to the facility and the animals that are present, and learn about equine-human trauma case conceptualization.

The Home Herds process will take place during the last half hour of each day to provide a landing strip for students to connect in smaller groups with a dedicated training assistant, as a place to settle, process the day, and voice any needs or questions for assistants to bring to their daily team meeting.

Level 2 Practice Module 1 allows students to deepen their practical application of what is covered during Level 1 through teaching and experiential activities (human-human, equine-human, demonstrations, and observation). Teaching and discussions explore the application of the material in relation to various equine-human scopes of practice, such as horsemanship, EAPL, equine behaviour consultation, equine bodywork, riding, etc. The focus of this Practice Module generally includes the following themes and topics applied to equines and humans:

- Deepening understanding of equine-human trauma recovery
- Setting the conditions for equines and humans
- Identifying and voicing needs and requesting support
- Helping / rescuing and disconnecting as management strategies
- Efforting, “help for the helper”, and support while supporting
- Attunement and vulnerability
- Stages of group formation
- Multi-level awareness: tracking SIBAM, sequences and patterns
- Deepening capacity for sustainable physiology and the counter-vortex

- Recognizing and tracking survival and conservation physiology
- Relational and boundary rupture and repair
- Biological and dyadic completion and renegotiation
- Moving towards, moving with, moving away
- Coupling dynamics
- Working with anticipatory and thwarted responses
- Titration and thresholds
- Renegotiating arrivals and departures in relationship (including object constancy)
- Introduction to touch skills
- Renegotiating consensual touch (or no touch)
- Intention and attention as a form of “touch”
- Meta-awareness of processes unfolding
- Structuring for containment and pendulation

Level 2 Practice Module 1 generally takes place over the fence or at liberty with equines. There is typically no haltering or leading during this module (with minor exceptions), in order to slow down the process and bring attention to nuances and what is over- or under-coupled in the process of navigating relationship from an ethological and developmental perspective.

Theory Module 2

***By pre-recorded video.** This module builds on the previous modules, deepening topics covered in Level 1 and 2 to date and covering new material not previously explored. Common topics for the Level 2 Theory Modules are outlined at the end of this section.

Practice Module 2

[formerly called Practical Intensive II]

***Live in person.** Practice Module 2 continues to build on previous material. Many of the topics from Practice Module 1 are revisited and deepened, based on the processes unfolding for the students and equines. In terms of specific equine cases, exploration will shift from conceptualization to treatment or service planning, with applications related to equines and humans as “clients” in various contexts. The topics that are generally covered in Practice Module 2 include:

- The 9 steps of the SE™ process of biological completion
- Thawing out of “freeze and appease” and the stages of group development
- Thwarted orienting and seeking responses
- Thwarted fight and healthy aggression
- Thwarted flight
- Thwarted “find” and dyadic completion
- Thwarted “flow”, agency, and aliveness
- Practical ways to support renegotiation of thwarted responses
- Cautions and caveats related to working with thwarted responses
- The 7 actions of SE™ practice in relation to equines and humans
- Trauma re-enactments and renegotiation in EAPL, round penning, groundwork, natural horsemanship, clicker training, equestrian disciplines, etc.
- Noticing and building capacity for coherence
- Refining intention, attention, and somatic inquiry language
- Refining the use of the maps taught in the program to navigate equine-human terrain
- Deepening of touch skills

Practice Module 2 includes interactions with equines over the fence, at liberty, haltering, and on a lead rope in different contexts, with a focus on renegotiation for both species.

NOTE:

- Students are encouraged to consider how to apply the material in their respective scopes of practice. Not all techniques and concepts will be appropriate for all students in all contexts.
- Themes and topics are generally introduced in the order listed above, with some variations. Subsequent modules refer to and elaborate on material covered in previous ones.
- The dates scheduled for the Practice Modules will differ based on facility availability, and each cohort attending at a particular location will have a different Level 2 start time.

Topics for Level 2 Online Theory Modules

Topics covered in the Theory Modules touch on the following material, and include but are not limited to:

- Equine ethograms and tracking SIBAM and pendulations in the equine
- Understanding and responding to appeasement behaviour
- Adapting various human frameworks for equine-human contexts
- Equines and humans as clients and/or participants
- Case conceptualization I: human as "client" (in EAPL, horsemanship, riding, etc.)
- Case conceptualization II: equine as "client" (in training, behaviour consultation, bodywork, etc.)
- Re-enactments between humans, and between humans and equines
- Specifics related to equine trauma, human trauma, and equestrian trauma
- The 4 quadrants of operant conditioning and complexities
- Where R- and R+ fit into the SE™ model (moving beyond behaviour shaping)

SAMPLE DAILY SCHEDULE FOR EACH LEVEL 2 PRACTICE MODULE

The following breakdown may differ depending on the weather and climate conditions at each location. If the weather is particularly hot, there may be additional time off mid-day to avoid the heat, dividing the day into a morning portion and a later afternoon/early evening portion.

Times	Focus	Notes
9:00-10:30am	On Day 1: Orientation, introductions, housekeeping. On Days 2-5: Orientation, large group discussion / teaching. Some experiential practice may occur here.	This schedule is subject to change based on the flow and needs of the equines and humans, the length of the demonstrations and debriefing, the length of the practice rounds, and the equine care schedule and other activities taking place at each facility. The timing and length of breaks may vary as well.
10:30-10:50am	Break (20 min)	
10:50am-12:30pm	Teaching and discussion, demonstrations and debriefing. Some experiential practice time may occur here.	
12:30-2:00pm	Lunch Break (90 min; personal sessions, if available)	
2:00-3:30pm	Demonstrations and/or experiential practice time.	
3:30-3:50pm	Break (20 min)	
3:50-5:00pm	Experiential practice time. Large group discussion / debriefing. Home Herds (4:30-5:00pm).	

Experiential Learning

EQUUSOMA® trainings are highly experiential in nature. While they include top-down lecture and discussion components (with slides and videos), the trainings also emphasize personal growth and transformation through body awareness, nervous system tracking, subtle attunement to state shifts, and growing organic capacity for self-regulation in a bottom-up way.

The subjects of trauma, attachment, and relational / boundary rupture and repair in equine-human contexts may be deeply personal. For this reason, trainings are supported by an assisting team to provide relational safety and a container for the experience. EQUUSOMA® trainings are as much about “being” as they are about “doing”, and although there are techniques and practical pieces to learn about, the participant’s nervous system is the main tool we use. As a result, the training is different from trainings that focus on cognitive knowledge, protocols, and skill building without deeper embodiment.

Interactive Components

Home Herds occur during the practical components of the training when we meet live, whether online or in person. The Home Herds consist of a smaller group of students meeting with an assigned training assistant, either at the start or at the end of the day. This is essential time for students to get to know a few of their fellow cohort members; explore the somatic experience of coming together as a “herd” and of anything else that may be relevant; and voice any questions, needs, or concerns that they might have. The Home Herds generally serve as a container or landing strip to assist with processing and integration of the material. Questions raised in the Home Herds will be brought to the larger group for discussion (anonymously if necessary) so that the rest of the cohort can benefit. Questions or concerns that require more sensitivity will be brought to the rest of the assisting team and faculty first to determine a course of action.

Demonstrations are when a team member or student consents to “lending” themselves to a faculty member or training assistant for the purposes of demonstrating some of the material being taught to the rest of the students observing, whether a principle, technique, skill, process, or way of being in the work. Formal demonstrations are usually recorded to support student and team learning.

Pairs practices typically consist of two students in a dyad exploring material together in an experiential way, with assistants and faculty available for support as needed. **Practice rounds** typically consist of 1-2 assistants and a small group of students rotating between the roles of practitioner, “lender” (i.e., the individual “lending” their nervous system for the practice), and observer. Each role is active and intentional in different ways.

It is not possible to record Level 1 practice rounds in online breakout rooms. Level 2 practice rounds in person are not usually recorded, unless students and equine owners offer consent. The practices are intended to primarily support those in the role of practitioner, for the practitioner to experiment with the learning and try new things with the support of the assisting team.

This means that while the demonstrations and practice rounds rely on the actual felt sense experience of the human and equine “lenders” (not a made-up role play), they are not “therapy” or a time to intentionally conduct deep personal work, even if these experiences feel “therapeutic” or transformative in some way. At other times, these experiences may feel challenging, uncomfortable, or neutral, and any or no outcome may occur as a result of participating in these experiences.

Group and Personal Process

While the training program is not group therapy, by virtue of the topics and themes that are taught in the training, the relational nature of equine-human trauma recovery work, and the experiential learning opportunities in the program, sometimes personal and group dynamics might play out for and between students, team members, and equines.

For example, **transference** is when individuals have an unconscious response towards a faculty member, training assistant, approved provider, or equine (such as projecting emotions, expectations, or blame when these are unwarranted; or repeating familiar relational patterns or themes stemming from past harm or unmet needs, whether personal, ancestral, collective, or systemic). Unconscious behaviours like splitting, colluding, triangulation, and trauma bonding with or against others can also occur in various group contexts. If left unaddressed, these patterns could lead to re-enactments, leading to double binds, self-fulfilling prophecies, and confirmation bias. Re-enactments could also unintentionally compromise one's capacity for learning, negatively affect one's perspective of the training, derail a group, and/or prevent repair. Follow-up support may be required in order to address complex dynamics if any arise.

The goal of our team is to model the principles taught in the program to the best of our abilities, according to our respective scopes of practice and training, in order to contain and navigate matters as they emerge. This includes modeling repair and accountability for what is in our locus of control, as well as bringing gentle curiosity to patterns that may be contributing to re-enactments that are beyond the team members' locus of control.

Any past or current experiences of gaslighting, scapegoating, crazymaking, invalidation, shaming, or lack of accountability and repair by authority figures can understandably make this aspect of repair more challenging for some people. This can also be the case if the nervous system is in a state that makes it difficult to remember details clearly; to differentiate between those experiences and what might be presently happening, or to orient to the cues of safety and nuances that are present now. Repair may also be more complex if there is any shame or defensiveness about these or other unconscious survival responses or patterns; and/or if there is cognitive dissonance between what a person believes and new information that may challenge those beliefs, especially if those beliefs served a survival function. Kindness and compassion are essential.

Choice and Consent

Students are responsible for managing their own safety, voicing their needs, and may opt to "pass" at any point on any individual or group activity or demonstration that they are not comfortable with or feel is beyond their capacity. Alternatively, discomfort with an experiential component may be a clue that the student is experiencing a need that may not yet have been voiced that, if addressed, would allow them to participate.

Those who agree to participate in a demonstration or during practice rounds do so voluntarily and at their own risk. Being a lender may involve being asked questions related to trauma history, symptoms, or patterns that a student would like to explore. Similarly, those in the practitioner role may also find themselves the focus of the practice when the assistant slides in with the intention of providing support or inquiring about the practitioner's experience and intentions.

Students have the right to change their mind, set boundaries around what they want to explore during demonstrations and/or practice time, or withdraw consent to participate in experiential components at any time, without this impacting their general involvement in the EQUUSOMA® program, unless it is deemed that the program is not the right fit at the present time. Overall attendance is required to complete the program, and a lack of active participation in experiential practices may limit one's integration of the material and compromise a student's ability to progress in the program in terms of their developmental trajectory in relation to the curriculum. The Schlote Psychotherapy Professional Corporation and its agents and representatives shall not be held liable or responsible for any injury or damage from a student's participation or involvement in any aspect of the training program.

Assistants and Approved Providers

Training Assistants

Training assistants volunteer their time and energy to support the EQUUSOMA® training.

The role and involvement of assistants varies during the Level 1 and 2 Practice Modules. Generally speaking, assistants take a collaborative and supportive role during practice rounds (pairs practices, practice rounds, and discussions). Assistants will slide into the practice rounds at various points to inquire about the practitioner's intentions, what is capturing their attention, to invite the practitioner to pause and track their own nervous system in support of the practitioner's regulation, and to point out different choice points. On occasion, the assistant may facilitate a group of students in an experience, co-facilitate with the student in the practitioner role, or may step in entirely in cases requiring more specific intervention for the "lender" or equine(s) that are involved. Assistants also support the Home Herds.

During in-person events, assistants also take on additional duties related to set up, tidying, snacks, dishes, running errands, and tear down at the end of the event.

Students are welcome to touch base with assistants from their cohort to bring forward any questions or needs as they arise. Assistants will either bring these matters to the assistant team and faculty to be addressed, or may suggest that the student book a formal personal session or consultation to address the matter, or both.

Approved Providers

Approved providers are hired by students to obtain personal sessions and/or consultations in the EQUUSOMA® training program for the purposes of completing their required credit hours.

Approved providers of personal sessions of Somatic Experiencing® and of case consultations or assignment consultations have been granted approval via the EQUUSOMA® program and/or Somatic Experiencing® International because they meet specific criteria. However, The Schlote Psychotherapy Professional Corporation and its agents and representatives do not monitor, control, influence, or regulate approved providers, and do not make any representations or warranties about the characteristics or quality of the services a student might receive with any given provider. The Schlote Psychotherapy Professional Corporation and its agents and representatives shall not be held liable or responsible for any acts or omissions by any provider or for any related legal claims.

Dual Relationships

Some training assistants are also approved providers of personal sessions of Somatic Experiencing® whom students may hire to complete their credit hours. Sometimes, an approved provider that you may have seen for personal sessions will assist at a training that you attend. Usually this does not pose any particular difficulty or conflict. Some students feel comfortable being in a Home Herd or in an experiential practice with an assistant who has provided them with one or a few personal sessions due to the pre-existing familiarity and trust that may have been established with that assistant.

In some cases, the nature of the relationship between an approved provider and a student means that it would be uncomfortable or problematic for that provider to be assigned to that student's Home Herd or to monitor that student's experiential practice time. Should there be a conflict of interest or dual relationship between an approved provider and a student during a training (or there is uncertainty or the potential for this to be the case), approved providers are expected to inform the faculty member or program liaison ahead of time so that we can ensure that we plan Home Herds and experiential practice time accordingly, such that the approved provider and student are not paired during these components. Assistants who are approved providers of

students who will be attending the same live training should disclose and discuss this with the students they are providing sessions to ahead of time, in order to prepare the student for how their role will be different during the training than during personal sessions.

Confidentiality

During training modules, assistants are not held to the same norms of confidentiality as apply during private sessions given the nature and context of their role. Generally-speaking, personal material shared during private sessions falls under the practitioner's standards of practice related to the limits of confidentiality. However, in order to ensure the safety of students and the group, assistants must share student disclosures pertaining to their experience in the program or with particular team members with the rest of the assisting team and the faculty so that important matters can be addressed effectively. Holding secrets puts the assistant in an untenable position, blocks renegotiation and repair from occurring, and can result in re-enactments that can negatively affect not only the student in question but the rest of the cohort and the team as a whole.

During group or individual experiential learning, students, staff, or faculty may report certain information to the team which gives rise to a duty to investigate. Sometimes students may report information to approved providers within the context of a one-on-one session which gives rise to a duty to investigate. A senior member of the EQUUSOMA® team may investigate the concerns reported to them or which they learn about. If a student is involved with the concern, that student will normally be asked to participate in the investigation. The senior investigating team member will try to keep the investigation and related information private. However, sometimes it may be necessary to share information relating to students, staff, or faculty with team members to complete the investigation fully and competently. The investigating team member will limit this disclosure to the minimum required disclosure to complete the investigation. The student acknowledges and consents to the disclosure of the student's information for investigation and resolution purposes, even if this information was originally revealed during a one-on-one session with a provider.

Complaints

All sessions and consultations with approved providers are undertaken at the student's own risk. If a student has any issues with or feedback about a particular approved provider, the student is encouraged to address that with the provider themselves. If repair or a resolution is not obtained and the student still requires follow up, students may contact the approved provider's licensing board, regulatory body, or professional association (for the provider's scope of practice) to file a complaint.

The Schlote Psychotherapy Professional Corporation and its representatives are committed to respectful and equitable service delivery and employment practices. Every person has a right to equal treatment in the provision of services and facilities, occupation of accommodation, contracts and in employment. The Schlote Psychotherapy Professional Corporation will not tolerate, ignore, or condone discrimination or harassment and is committed to promoting respectful conduct, tolerance and inclusion. All complaints will be investigated and treated confidentially and there shall be no reprisal. Should a student or team member be found to have engaged in discrimination or harassing conduct, the Schlote Psychotherapy Professional Corporation may take any necessary steps to stop such conduct up to and including termination of their Agreement and expulsion from the program.

For information about complaints, please see the Feedback and Dispute Policy (pages 66-67).

Log Hours for Certificate Track

EQUUSOMA® Certificate Track students must complete a set number of personal sessions of Somatic Experiencing® (with and/or without equines present, depending on the level), case consultations, and assignment consultations to support their progression throughout the program and their integration and embodiment of the material.

General Information

- Each personal session of Somatic Experiencing®, case consultation, and assignment consultation is typically 1 hour long. If the length of your appointments is different, please ensure that the total required hours are met.
- These required hours are not included in the cost of the tuition for the Theory Modules and Practice Modules. Hourly rates vary by provider, based on their scope of practice, the industry standards and cost of living in their respective locations, their skill level and training, their years of experience, their business expenses, etc. Some providers may need to charge tax.
- Some providers, at their own discretion, offer a **sliding scale or pro bono services** for students who are facing financial limitations or who are attending the EQUUSOMA® program on a scholarship. Such accommodations are not a guarantee, and depend on the provider's capacity to offer them. Students may be placed on a waitlist for sliding scale or pro bono spots if none are currently available. Approved providers may inquire with liaison@equusoma.com to confirm a student's scholarship status, if applicable. See Scholarship Program (pages 26-27) and Pricing Policy (page 44) for more information.
- We strongly recommended that you space your personal sessions throughout each level of training to receive maximum benefit, as opposed to waiting until the very end of each level.
- We encourage you to complete your sessions and consultations with a variety of approved providers so that you may benefit from their different areas of expertise, scopes of practice, and styles. However, you are welcome to complete them with the same provider or with a couple of providers, if this is a better fit.
- If you know of a Somatic Experiencing® Practitioner who is involved with equines and is not currently on our list of approved session or consultation providers, please contact us at liaison@equusoma.com to inquire about the possibility of them becoming an approved provider.

Personal Sessions of Somatic Experiencing®

- Personal sessions of SE™ are required to complete the EQUUSOMA® training program.
- The purpose of receiving SE™ sessions with an approved provider is educational: to observe and experientially learn how SE™ principles are applied in practice so as to support your professional training and development. These sessions are not intended as formal "psychotherapy" per se, but rather to provide somatic education and experiential learning to support your own nervous system to experience what bottom-up processing is like as led by different professionals.
- A common outcome of these sessions is that you may find that your own nervous system capacity shifts or expands in new ways, which also supports you in doing equine-human trauma recovery work. These sessions also allow you to integrate on an embodied level the teachings obtained during the

lecture portions of the training. SETM sessions can be completed with a variety of approved providers in different scopes of practice, allowing you to experience a variety of different styles.

- Of course, SETM can also be offered within a formal psychotherapeutic or other kind of helping relationship with a provider with whom you have entered a formal contract for their services and/or treatment. However, this is not required for the purposes of the EQUUSOMA® program.
- Personal sessions of SETM can be completed in person or online.
- **Level 1 students:** The 10 required personal sessions of SETM should not involve equines, in order for you to be able to focus primarily on your own nervous system without the added nuances of another nervous system participating, which will be explored in the Practice Modules.
- **Level 2 students:** The 5 required personal sessions of SETM may involve equines, if available (if not, then these sessions can simply be a continuation of the SETM sessions without equines you completed for Level 1). If SETM with equines is available, the sessions may involve the following:
 - Equine-assisted psychotherapy/learning where equines are present and SETM is used to support you and the equine(s), **or**
 - Horsemanship instruction (groundwork), riding coaching, or equine behaviour consultation and shaping where SETM is used to support you and the equine(s), **or**
 - Equine bodywork, where SETM is used to support you and the equine(s), **or**
 - Animal communication or animal death/grief doula services, where SETM is used to support you and the equine(s), etc.

Approved Personal Session Providers

Personal sessions of SETM without equines (Level 1 or 2) can be completed with either:

- A. Any EQUUSOMA®-approved personal session provider in our directory, at <https://equusoma.com/directory/>; OR
- B. Any approved **Advanced level** personal session provider in the Somatic Experiencing® International approved provider directory (not their general SETM Practitioner directory), located at <https://traumahealing.org/credit-providers/>.

Please contact liaison@equusoma.com if you need assistance in locating an approved provider.

Personal sessions of SETM that include equines (Level 2 only) can be completed with either:

- A. Any EQUUSOMA®-approved personal session provider in our directory, at <https://equusoma.com/directory/>; OR
- B. Any approved **Advanced level** personal session provider in the Somatic Experiencing® International approved provider directory (not their general SETM Practitioner directory), located at <https://traumahealing.org/credit-providers/> who offers SETM in relation to horses within their scope of practice (e.g., equine-assisted psychotherapy/learning, riding instruction, horsemanship coaching, animal communicator, equine bodyworker, animal death doula, equine behaviour consultant, etc.), **provided that they apply SETM to the equines as well.**

- **NOTE:** If this person is not an EQUUSOMA®-approved personal session provider or involved as an EQUUSOMA® training assistant (or if the person is a Somatic Experiencing® Practitioner but is not yet approved for sessions at the Advanced level of SE™ training), please contact liaison@equusoma.com to discuss and read the next section below.

Non-Approved Personal Session Providers

- Personal SE™ sessions completed **prior** to our implementation of the Advanced level SEI approval requirement on March 3, 2021 **will still count** (the Program Completion Policy still applies, pages 45-51), even if they were completed with a provider who no longer meets the requirements.
- Personal SE™ sessions completed **since** March 3, 2021 with an SEP who does **not** meet the above criteria **will not count** towards the required total hours, **except in cases of accessibility and diversity needs**. For instance, personal SE™ sessions **will still count** if completed with a non-approved SEP:
 - Who speaks your first language; **or**
 - From your identity community (e.g., BIPOC, 2SLGBTQIA+, etc.); **or**
 - In person, if video sessions with an approved provider further away will pose undue physical hardship (e.g., having a disability, sensory sensitivities, or a brain injury making screen time difficult), or if video sessions are not possible because of being rural or remote without sufficient internet for video calls; **or**
 - Who has offered you a sliding scale rate or pro bono sessions to accommodate severe financial limitations, and you have not managed to locate an approved provider who is able to offer similar accommodations.
- Students who have completed sessions (or who intend to complete sessions) with a non-approved provider **must contact us first** to discuss and ensure they meet the parameters indicated above: liaison@equusoma.com. If you have located an SEP who offers services involving equines who is not currently involved with EQUUSOMA®, please bring this to our attention so that we can follow up to see if they might be interested and/or a good fit.

Previously-Completed SE™ Sessions

- **For EQUUSOMA® students without training in SE™:** Personal SE™ sessions will count if completed within 3 years of the date of day 1 of beginning EQUUSOMA® Level 1, provided they meet the requirements above.
- **For EQUUSOMA® students with training in SE™:** Please see the SE™ Student and SEP Parameters section (pages 23-24) for specific instructions about personal sessions.

Consultations

Case Consultations

Case consultations may be completed with any EQUUSOMA®-approved consultation provider, and are primarily to discuss the application of EQUUSOMA® material within your professional scope of practice with your client or customer base (whether your primary “client” is the equine, the human, or both). If you are not currently working in your intended scope of practice, the case consultations can be used to explore the integration of the material in the context of a personal relationship you have with an equine or in the context of volunteer experiences with equines.

If you registered for the EQUUSOMA® training with a co-facilitator or with a group of coworkers and wish to consult about a mutual case, your co-facilitator/coworkers can attend your case consultation with your consent, but the hour will only count towards your required hours. Conversely, your co-facilitator/coworkers must book

their own individual case consultations for their required EQUUSOMA® hours, that you are welcome to attend with their consent. Payment for the consultation must be made by a single individual, even if the cost of the consultation ends up being shared (students will address any splitting of the cost of case consultations with co-facilitators or coworkers separately).

All students must respect the norms of confidentiality of their scopes of practice pertaining to case consultations, whether they are alone or their co-facilitator or coworkers attend. If a student does not have a scope of practice that has confidentiality standards, the student must ensure that they at least have the written disclosure consent of their client(s) to discuss their case in consultation (with or without other co-facilitators or coworkers present).

- **For EQUUSOMA® students with training in SE™:** Please see the SE™ Student and SEP Parameters section (pages 23-24) for specific instructions about case consultations.

Assignment Consultations

Assignment consultations may only be completed with EQUUSOMA® faculty members (currently) or approved assignment consultation providers (in future, if available), and are to help you complete your final assignment at each level of the training. Please ensure you have submitted your draft to your consultation provider at least 2 weeks in advance of your first assignment consultation. Please see the Assignment Instructions (pages 28-33) for more information.

Assignment Final Review

The final review of your completed assignment at the end of Level 2 must take place with an EQUUSOMA® faculty member (a different one if you worked with a faculty member for your assignment consultations).

Log Hour Total Requirements

	Personal Sessions	Case Consultations	Assignment Consultations	Final Review
Level 1	10 hours	6 hours	4 hours	N/A
Level 2	5 hours	6 hours	2 hours	1 hour
TOTAL	15 hours	12 hours	6 hours	1 hour

The above totals are the minimum required number of hours. Some students complete more than these total amounts in support of their nervous system and learning needs.

Adapted from October 31, 2022 Handbook:

- The number of required hours in each of the categories in the table above has been updated to better reflect the needs of the students, based on feedback and their integration of the material.
- Students who completed their hours prior to October 31, 2022 based on the past requirements **will not have to re-do any hours** based on the changes [to approved providers] outlined above.
- **Personal Sessions Requirement Changes:**
 - Level 1 students are **no longer** required to complete 5 of the 10 personal sessions **prior** to attending Theory Module 3. The 10 sessions can be completed at **any** point during Level 1.
 - Level 2 students are **no longer** expected to complete any sessions of SE™ with and/or for equines, but may do so if this is available. This is in recognition of the fact that not all students are located in proximity to an approved provider offering SE™ with equines, which posed a barrier to many students.

- **Case Consultation Requirement Changes:**
 - All case consultations must be completed prior to beginning the assignment consultations, in order to be as well-grounded in the EQUUSOMA® material as possible. Students who did not complete things in this order prior to October 31, 2022 will not need to re-do any consultations and will simply proceed from where they are at.

- **Assignment Consultation Requirement Changes:**
 - All consultations are individual (1:1) and are **no longer** possible to be completed in a group format. All group consultations that were begun and/or completed up until October 31, 2022 will still count.
 - As a result of removing the group consultation option for the assignment, the number of assignment consultation hours has been adjusted to provide students with more time to fully review their work. The shift from group to individual consultations has resulted in a reduction in the total number of assignment consultations.
 - There is no more final review required at the end of Level 1, as this has been moved to the end of Level 2.

Somatic Experiencing® Student and SEP Parameters

The following parameters have been updated and modified to align with the changes in our Level 1 program as a result of transitioning to our new eLearning portal in September 2023. This replaces the previous policy.

Level 1 Program

Taking SE™ training is not required to do EQUUSOMA® training. However, due to the close relationship between the two models, there are often SE™ students and SE™ Practitioners (SEPs) who are interested in the EQUUSOMA® program. Yet, while there is some overlap, the two are also different in many respects. One key example is the application of SE™ to the equine nervous system. For this reason, **SE™ students are no longer exempt from any theory portion of the EQUUSOMA® program.** However, there are still some accommodations available below to SE™ students who are interested in the EQUUSOMA® program.

Beginning I SE™ Students

Attending EQUUSOMA® Level 1 Theory Module 2 **and** its associated Practice Module 1 is **mandatory** for EQUUSOMA® students who have completed Beginning I SE™. Some of this material will be review for Beginning I SE™ students, and some of it will be new. Priority in the practice rounds will be for non-SE™ students to be in the practitioner and lender roles. SE™ students in this category will contact info@equusoma.com prior to registering for the EQUUSOMA® Level 1 training to obtain a discount code and will provide proof of attendance at SE™ Beginning I (certificate of attendance is required; payment receipts do not prove attendance).

Students who register for the EQUUSOMA® training having only completed SE™ Beginning I at the time of registration will register based on the policy outlined above, even if by the time they start EQUUSOMA® Level 1, Theory Module 1 or 2 they will have completed SE™ Beginning II. Alternatively, these students may wait until they have completed SE™ Beginning II to register for the EQUUSOMA® Level 1 program in order for the policy in the section below to apply, provided there is still space in the Level 1 program at the time of their application and the registration process has not closed.

Beginning II to Advanced II SE™ Students and SEPs

While watching the EQUUSOMA® Level 1 Theory Module 2 recordings is **mandatory**, attending the associated Practice Module 1 is **optional** for EQUUSOMA® students who have completed Beginning II to Advanced II SE™ or who are SEPs. If they do join, priority in the practice rounds will be for non-SE™ students to be in the practitioner and lender roles, with the SE™ students in the observer role. SE™ students in this category will contact info@equusoma.com prior to registering for the EQUUSOMA® Level 1 training to obtain a discount code and will provide proof of attendance for the SE™ training modules that they have attended (certificate of attendance of the most recent module is required; payment receipts do not prove attendance).

Level 2+ Program

There are no exceptions for SE™ students and SEPs when it comes to the EQUUSOMA® Level 2 program and beyond. Attendance at is mandatory at all Level 2 training components.

Double Duty Hours

EQUUSOMA® students who are also taking SE™ training simultaneously may be able to use the sessions they completed in one program to complete the requirements for the other program, thereby preventing duplication of time and costs related to personal sessions. This is only possible if the approved provider meets the requirements of both programs. Some EQUUSOMA®-approved providers are also SEI-approved providers. For instance:

- Some EQUUSOMA®-approved providers are also SEI-approved for personal sessions and/or case consultations at either the Beginning, Intermediate, or Advanced level of SE™ training. However, students must make sure that the EQUUSOMA®-approved provider they select is SEI-approved at their current SE™ training level for the sessions and consults to count with SEI.
- Some EQUUSOMA®-approved providers are not SEI-approved providers, meaning those sessions or consults would not count with SEI.
- Any Advanced-level SEI-approved provider is able to provide personal SE™ sessions for EQUUSOMA® students.
- Sessions completed with SEI-approved providers who are either approved at the Beginning or Intermediate levels (or who are not yet approved, and are simply SEPs) will only count towards the EQUUSOMA® training requirement in cases of accessibility and diversity, as outlined above.

Any consultations completed as part of SE™ training that pertained to equines will only count for EQUUSOMA® if completed with someone who is also an EQUUSOMA®-approved consultation provider, in order to ensure that the consultations align with the EQUUSOMA® curriculum. Not everyone who is using SE™ in equine-human contexts is applying the ethology or the practice of SE™ to equines themselves in various scopes of practice.

EQUUSOMA® Students who are Advanced Level SE™ Students or SEPs

For new EQUUSOMA® program registrants that have started the Advanced level of SE™ training or are SEPs (by the time of their EQUUSOMA® Level 1 registration), the personal SE™ sessions completed during the course of your SE™ training prior to registering with EQUUSOMA® will count as credit towards your required EQUUSOMA® log hours, regardless of their level of SEI approval, due to the added experience you have gained via the SE™ training program.

EQUUSOMA® Students who are Active SE™ Students (Beginning and Intermediate Levels)

If you want your SE™ sessions to count towards your EQUUSOMA® requirements, please select an SEI-approved personal session provider who is approved to provide sessions at the **Advanced level** of SE™ training. Even if you are only at the Beginning or Intermediate level of SE™ training, an Advanced-level personal session provider can provide you with sessions at all levels. This way, you meet the requirements of both the SE™ and EQUUSOMA® training programs.

SEPs with Equine Experience

SEPs who have experience with equines (or Advanced-level SE™ students with equine experience) may be interested in becoming EQUUSOMA® training assistants as opposed to taking the EQUUSOMA® training as a student. Becoming an EQUUSOMA® training assistant is the first step to becoming an approved provider of personal sessions and consultations for EQUUSOMA® students. For more information, please review the website or contact liaison@equusoma.com.

Parallel Program Applicants

The following parameters have been updated and modified to align with the changes in our Level 1 program as a result of transitioning to our new eLearning portal in September 2023. This replaces the previous policy.

Students and graduates of programs that bear some similarity to the Somatic Experiencing® training register for the EQUUSOMA® program on occasion. These include but are not limited to the following:

1. **Approaches that were developed by SEPs or former SE™ faculty members**, such as but not limited to: Somatic Transformation, Self-Regulation Therapy (SRT), Somatic Resilience and Regulation (SRR), NeuroAffective Relational Model (NARM), NeuroAffective Touch, Bodywork and Somatic Education (BASE), and Organic Intelligence.
2. **Approaches that share a theory and knowledge base**, such as Sensorimotor Psychotherapy (SP).
3. **Webinars, online conferences, or self-study programs featuring aspects of Somatic Experiencing®**, such as those offered by SEI, NICABM, Sounds True, Irene Lyon, etc.

Students and graduates of these parallel programs (categories 1-3 above) **must complete the entire EQUUSOMA® program and are not exempt from any steps in the EQUUSOMA® training**. This ensures that all students have the same foundation in terms of terminology, concepts, and SE™ skills, as these will be referred to throughout the EQUUSOMA® training program.

Somatic Experiencing® teaches specific maps and methods for working with phenomenology that EQUUSOMA® uses to explore and work with equines as well as humans. EQUUSOMA® also goes beyond the SE™ model and includes other material that parallel program students may not be exposed to or familiar with. While some of these parallel programs may use similar terminology or have similar concepts and skills, they are not direct equivalents and may not teach the same maps, or they might not use them in the same way.

Parallel Program Graduates with Equine Experience

In exceptional cases, parallel program graduates (categories 1 and 2 only) who have experience with equines may potentially be eligible to become EQUUSOMA® training assistants as opposed to taking the EQUUSOMA® training as a student, depending on their background. Additional requirements may apply. Granting an exception is not a guarantee. For more information, please review the website or contact liaison@equusoma.com.

Inclusion Scholarship Program

Scholarship Scope

EQUUSOMA® is committed to anti-racist and anti-oppressive practice, inclusion, and supports interspecies social justice as part of a trauma-informed perspective. As a result, EQUUSOMA® issues two full scholarships per Level 1 cohort and one full scholarship per Level 2 cohort.

Full Scholarships

1. One for an eligible student who identifies as Black, Indigenous, or as another person of colour (BIPOC) who faces financial inequities as a result of racism/racialized trauma; **and**
2. One for an eligible student who is facing financial limitations due to other disparities (this could be another individual from the BIPOC community, or someone facing inequity due to other experiences of marginalization)

Each full scholarship covers the full cost of tuition for the training components at the Level in question.

Partial Scholarships

Partial scholarships may be offered to students in Level 1 and Level 2 on a case-by-case basis and are not a guarantee. Partial scholarships involve tuition that is paid on a sliding scale basis, pending availability. We have adapted and apply the following **sliding scale framework**, originally developed and made available for use by Alexis J. Cunniffolk, in the spirit of supporting accessibility:

- **The highest dollar cost** reflects the true cost of the course or service. It is the cost that would be charged to all students in the absence of a sliding scale. If you have access to financial security, own property, or have personal savings, you would not traditionally qualify for a sliding scale rate or fee. If you are able to pay for "wants" and spend little time worried about securing necessities in your life, you have economic privilege and power in our community. This price is for you.
- **The middle cost [the range of prices between the highest and bottom cost]** acknowledges that paying the full cost would prevent some folks from being able to attend, but who do not honestly find themselves reflected in either descriptions for the highest cost or the lowest. If you are struggling to conquer debt, build savings, or move away from paycheck to paycheck living but have access to steady income and are not spending most of your time thinking about meeting basic needs such as food, shelter, medical care, child care, etc., you belong in this category. Students in this category may vary in what the middle cost is for them that they can pay; for some, it will be closer to the highest dollar cost, for others it will be somewhere in the middle, and for others it will be nearer to the bottom. If you, however, can ask others for financial support, such as family members, partners, or friends, please consider using those personal resources before you use the resources of the sliding scale and limit opportunities for others.
- **The bottom cost** represents an honest acknowledgment that there are folks whose economic circumstances would prevent them from taking part in opportunities if there was not be a deliberate opportunity made for them to access services at a cost that is reflective of their economic realities. If you struggle to maintain access to needs such as health care, housing, food, child care, and are living paycheck to paycheck or are in significant debt, you belong probably belong here and you deserve a community that honors your price as equal an economic offering as the person who can pay the highest tier. Even when the lower tier is still prohibitive, we can explore offering payment plans.

- Typically, there is a limited amount slots for products, services, and classes offered at the middle and lower end of the scale. **Please be mindful that if you purchase a price at the lowest end of the scale when you can truthfully afford the mid-range or highest ticket prices, you are limiting access to those who truly need the gift of financial flexibility.** Being honest with yourself and your financial situation when engaging with sliding scale practices grows strong and sustainable communities. It also respects the work of teachers and creators who also have families and staff to support and expenses to pay. Additionally, when we are paid fairly, we are able to invest more time and resources to free and lower cost offerings.

For more information about the values surrounding this sliding scale model, see Cunningsfolk (2015)¹.

Additional Details

The scholarships do not cover incidental costs, such as:

- Purchasing the required readings
- Hiring a team member to make-up any missed experiential time (if applicable)
- Hiring an approved provider to complete the personal session and consultation requirements
- Meals, travel, and accommodation costs during the Level 2 Practice Modules

Students must re-apply for a scholarship when proceeding to a different training Level. If a scholarship student is unable to proceed with the program for any reason, there is no guarantee that a scholarship spot will be available when the student is ready to resume the program at some point in the future. Prior scholarship holders who wish to resume the program will inquire with laison@equusoma.com to find out if there are any scholarship spots available. A partial scholarship may be awarded at the discretion of the Schlote Psychotherapy Professional Corporation, pending availability.

Scholarship students will disclose their scholarship status when inquiring with faculty, assistants, and approved providers about the possibility of a sliding scale fee or pro bono services (free of charge). However, some team members may not currently have space available and there may be a waitlist involved in accessing services that are offered on a sliding scale or that are offered pro bono.

Application Process

Students who wish to apply must submit a short essay (500 to 1,500 words) outlining their background, their professional goals, and how they intend to apply EQUUSOMA® within their scope of practice. The **deadline** to apply for a scholarship is 60 days before Day 1 of Theory Module 1 (whether Level 1 or Level 2).

We want to ensure that we are being mindful of how we are applying the scholarships in light of recent highly publicized cases involving misidentification and misrepresentation of ancestry. Given our desire to be respectful of this sensitive issue, students applying for the first category of scholarship are asked to provide us with any details or clarification in this regard.

Eligible participants who are not awarded a full scholarship may be eligible for a partial scholarship at the discretion of the Schlote Psychotherapy Professional Corporation, pending availability.

¹ <http://www.wortsandcunning.com/blog/sliding-scale>

Assignment Instructions

The goal of the assignments is to support the integration of what you have learned to date. The assignment, which begins in Level 1, consists of producing **either**:

- A. A group workshop / clinic curriculum **or**
- B. A case conceptualization and treatment / service plan

The curriculum or the treatment / service plan will be the equivalent of 12 hours of service time.

The assignment will either focus on 1) human(s) as client(s), 2) equine(s) as client(s), **or** 3) both, within your scope of practice. 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 Practice Modules and completing the sessions and consultations required for Level 2. Additional details about each option are outlined below. Please see the additional assignment instructions (at the bottom of page 47) pertaining to students who only join the Certificate Track in Level 2, as slightly different steps apply.

Assignment Completion Process

- So that you have as much grounding in the model as possible in order to guide the development of your assignment, please complete the Level 1 and/or Level 2 Theory and Practice Modules (as applicable) and the working required number of individual case consultations for each level prior to beginning (or revising) your assignment and booking your case consultations.
- 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 EQUUSOMA® faculty member to begin the process of setting up your assignment consultations.
- Each faculty member will have slightly different preparation instructions. Typically, the faculty member will ask you to submit your draft assignment to them a few weeks before the date of your consultation. The faculty member will read through your assignment in advance and will come to your consultation prepared to discuss your assignment's strengths and provide feedback. Please be sure to ask the faculty member any questions you might have. You do not need to formally "present" your assignment during your consultation time. While there is a required number of assignment 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.

- After you have completed all your Level 1 assignment consultations, please revise your assignment with the feedback that was provided to you, and submit it via your student portal. If you have any difficulty, please contact us at info@equusoma.com
- After your Level 2 assignment consultations and revisions, you will then book an individual consultation with a different faculty member for a final review in order to get a different perspective. After you have completed this final review, please revise your assignment with the remaining feedback and submit it via your student portal.

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

Create a curriculum for a group 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 within your scope of practice. 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 humans and equines 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 the program.

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 animals or a facility's animals, or the equines belonging to the clinic participants?
- Your target population (describe the clients or participants the curriculum is for). Are the intended clients A) the humans, B) the equines, or C) both?
- 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. This includes but is not limited to being mindful of speciesism and anthropocentrism given the equines).
- Your event's scope (Experiential learning? Therapeutic or mental health focus? Horsemanship skills or riding instruction? Equine behaviour consultation? Equine bodywork? Animal communication? Etc.).

- 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, arrivals, and departures 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 primary "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

Provide a case conceptualization and treatment / service plan for either A) a human client (e.g., in the context of equine-assisted psychotherapy or learning or therapeutic/adaptive riding), or B) for an equine client and their owner/rider (e.g., in the context of horsemanship instruction, equine behaviour consultation, equine bodywork, animal communication, 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 either the human client or the involved human if the equine is 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 for review. 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 practitioner, equine behaviour consultant, horsemanship trainer, riding instructor, equine health practitioner or bodyworker, animal communicator, etc.).
- Description of the client (equine 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 equine, include any information you have gathered (from the person’s self-report or your observations) about the person that is bringing this equine 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. Remember, you are not diagnosing if this is not in your scope of practice, 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. Indicate what other approaches you intend to weave into the work and how you will adapt them based on what you have learned in the EQUUSOMA® program so far.

- 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. This includes but is not limited to being mindful of speciesism and anthropocentrism given the equines).
- 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 as well as EQUUSOMA® founder, Sarah Schlote, for the purposes of accurate documentation.
- 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).

Sample Disclosure Consent Letter Form

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. One of the assignment options is providing a written case conceptualization and treatment plan **[or service plan]** for a client (equine and/or human) in the context of my professional work.

The case conceptualization and plan will include background information about the human, equine, or human-equine 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 faculty members 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 program faculty will not share my assignment or use it for their own purposes. All individuals in the EQUUSOMA® program teaching team 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(s) and Sarah Schlote to ensure that I have met ethical guidelines in completing this assignment. Your name **[and/or the name of your equine, if working with the human client's animal]** 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

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. 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 human 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!



ADMINISTRATIVE POLICIES

Privacy Policy

The Schlote Psychotherapy Professional Corporation and its agents and representatives are committed to protecting your personal information and your right to privacy. Please read this privacy policy carefully as it will help you make informed decisions about sharing your personal information with us.

What Information is Collected?

During your involvement in the EQUUSOMA® program, you trust us with your personal information. This includes, but is not limited to the following:

- Name and contact information
- Emergency contacts
- Professional background and training
- Payment methods (including credit card information)
- Health needs (e.g., dietary restrictions, allergies, other physical conditions)
- Personal, emotional, physical, and mental health needs and experiences
- Professional case examples from your work, such as stories involving other animals and people
- Your likeness, in the form of your image and voice in video recordings and photography
- Any testimonials or anonymous anecdotes about your experience in the program

Some of this information is required as part of the registration process, while some of this information may be disclosed by students during or after the program.

How Will This Information be Used?

Information that is collected as part of the registration process helps us to process payments and registration, administer the program, track the demographics of our students, attend to student needs from an inclusion and accessibility standpoint, and to identify potential geographic areas for future in-person trainings.

Student and team member email addresses are shared within each cohort for the purposes of facilitating communication and coordination.

Questions, concerns, and examples that are disclosed during Home Herds, side conversations, discussions, demonstrations, experiential practice time, and/or in feedback forms allow us to tailor our teaching and experiential activities to what is coming up for students, and to provide relevant resources and suggestions. We also discuss this information during our assisting team meetings for the purposes of identifying how to best support students.

Will Your Information be Shared with Anyone?

We do not sell your information to third parties. All team members and students have signed an agreement that includes respecting confidentiality and privacy. Many team members and students are also part of a profession that requires them to abide by specific legislation and standards of practice around privacy and confidentiality, and are therefore mindful about the use of discretion related to personal information.

Information shared with the program liaison, assistants, and faculty members during and in-between training components that pertains to the student's experience in the training program is discussed as a team and is not considered confidential in the same way as personal information shared during private sessions about other matters on which students may wish to focus their sessions. Training assistants cannot be left holding secrets that pertain to dynamics between students or between students and team members, especially when these may put the assistant in a conflict of interest or increase the likelihood of a re-enactment that may negatively

affect the safety of the student, group, and team. While confidentiality still applies (information will not be disclosed publicly in order to respect privacy), the limits are different than for the personal sessions of SE™ that students complete for their log hours.

Personal information that is disclosed during personal SE™ sessions and consultations remains confidential with the approved provider that you hired to obtain these services as part of the requirements of the EQUUSOMA® program. Approved providers will not share private information that you disclosed to them in the context of these personal sessions and consultations, unless:

- You have granted specific consent to your approved provider to do so for specific circumstances that you agree would benefit you (e.g., if information you disclosed to your provider during a personal session or consultation about something you are facing at the moment unrelated to the training program might help the rest of the assisting team support you more effectively during a particular Practice Module).
- An approved provider needs to consult with a faculty member about how to navigate a particular situation involving a student, where seeking consent in advance may not be possible. If this occurs, an approved provider must not disclose who the student is when seeking guidance (de-identifying the information). Whether or not the identity of the student is concealed or becomes obvious to the faculty member, the faculty member must maintain confidentiality, and the approved provider must let the student know as soon as possible that they disclosed de-identified information. Approved providers are encouraged to have students sign an informed consent form prior to offering personal SE™ sessions and consultations that outlines the limits of confidentiality and lets students know that they might consult with EQUUSOMA® faculty members on occasion for the purposes of ethical service delivery.

In addition, during group or individual experiential learning, students, staff, or faculty may report certain information to the team which gives rise to a duty to investigate. Sometimes students may report information to approved providers within the context of a one-on-one session which gives rise to a duty to investigate. A senior member of the EQUUSOMA® team may investigate the concerns reported to them or which they learn about. If a student is involved with the concern, that student will normally be asked to participate in the investigation. The senior investigating team member will try to keep the investigation and related information private. However, sometimes it may be necessary to share information relating to students, staff, or faculty with team members to complete the investigation fully and competently. The investigating team member will limit this disclosure to the minimum required disclosure to complete the investigation. The student acknowledges and consents to the disclosure of the student's information for investigation and resolution purposes, even if this information was originally revealed during a one-on-one session with a provider.

Video recordings are used to support student and team member learning. Photography is used to provide visual illustrations in training material and to help promote the program (see Audiovisual and Social Media Policy, page 57). Testimonials, anecdotes, and examples of experiences are used to support learning and to help promote the program.

Additional circumstances where your information may be shared include:

- **Compliance with Laws:** We may disclose your information where we are legally required to do so in order to comply with applicable law, governmental requests, a judicial proceeding, court order, or legal process, such as in response to a court order or a subpoena (including in response to public authorities to meet national security or law enforcement requirements).

- **Vital Interests and Legal Rights:** We may disclose your information where we believe it is necessary to investigate, prevent, or take action regarding potential violations of our policies, suspected fraud, situations involving potential threats to the safety of any person and illegal activities, or as evidence in litigation in which we may be involved.
- **Business Transfers:** We may share or transfer certain information in connection with, or during negotiations of, any merger, sale of company assets, financing, or acquisition of all or a portion of our business to another company.
- **With your Consent:** Your formal documented consent is required for us to disclose information for any other purpose, in accordance with what is set out above.

How Long Do We Keep Your Information?

We will only keep your personal information for as long as it is necessary for the purposes set out in this privacy policy, unless a longer retention period is required or permitted by law (such as tax, accounting or other legal requirements). When we have no ongoing legitimate business need to retain your personal information, we will either delete or anonymize it, or, if this is not possible (for example, because your personal information has been stored in backup archives), then we will securely store your personal information and isolate it from any further access until deletion is possible.

How Will This Information be Stored?

Some student personal information is stored in electronic format in various platforms, such as Owl Practice, Airtable, Ontraport, and WordPress, etc. Video recordings of events are either stored on team members' devices, Zoom's cloud storage, Vimeo, or other storage platforms. Data is stored on servers that are located in Canada and/or in the USA, making it subject to Canadian and/or US law.

We have implemented appropriate technical and organizational security measures designed to protect the security of any personal information we process. However, please also remember that we cannot guarantee that the internet itself and online methods of communication (email, messaging apps) and data storage are 100% secure. While the team makes its best efforts to ensure security and compliance with applicable privacy legislation, transmission of personal information through virtual methods is at your own risk. You should only access online services within a secure environment. The Schlote Psychotherapy Professional Corporation shall not be held liable should such data storage related to personal information fail or otherwise become irretrievably lost for reasons beyond its control.

What Are My Privacy Rights?

Based on the laws of some countries, you may have the right to request access to the personal information we collect from you, change that information, or delete it in some circumstances. To request to review, update, or delete your personal information, please contact us at info@equusoma.com. We will respond to your request within 30 days. If you believe we are unlawfully processing or using your personal information, you may have the right to complain to your local data protection supervisory authority.

Upon your request to terminate your account with the EQUUSOMA® program, we will deactivate or delete your account and information from our active databases. However, some information may be retained in our files to prevent fraud, troubleshoot problems, assist with any investigations, enforce our Terms of Use and/or comply with legal requirements.

If you have any questions or concerns about our policy, or our practices with regards to your personal information, please contact us at info@equusoma.com. Please see the Feedback and Disputes Policy (pages 66-67) for additional details.

Equity, Diversity, and Inclusion Policy

Commitment to Social Justice

EQUUSOMA® emphasizes trauma-informed practice, and being trauma informed means recognizing the disparities in adversity facing different groups of humans and equines. With this in mind, we acknowledge the importance of striving to address the systemic barriers and adverse conditions that unequally impact various marginalized populations regardless of species. We envision a world where there is an increased felt sense of safety and belonging for groups that have been marginalized and historically excluded on account of their species, breed, race, ethnicity/culture, language, sex, gender identity or expression, sexual orientation, age, religion/creed, disability, neurodivergence, body shape and size, and other grounds.

The Schlote Psychotherapy Professional Corporation and its agents and representatives have a zero-tolerance policy for discrimination and harassment, between and/or towards EQUUSOMA® team members and students. This includes: sexual harassment, physical violence and verbal aggression, racism, ableism, sexism, homophobia, transphobia, fatphobia, and other forms of discrimination/harm against different identity communities. We also recognize that unintentional mistakes will occur in the process of making changes and improvements to be more inclusive. We remain dedicated to navigating these complex matters with sensitivity, openness, and integrity, and to abiding by applicable standards related to human rights and accessibility.

The five principles of social justice are access, equity, diversity, participation, and human rights/equine welfare. Not all of these principles apply to the same degree to equines, given their domestication in human society. However, wherever possible, we aim to do no harm and, at best, do good, and to consider our role as humane stewards, as taught in greater detail in the program.

The present policy outlines our intentions in relation to humans in the EQUUSOMA® community, as well as our progress to date. Further details related to equines are included in the EQUUSOMA® Code of Ethics.

Specific Objectives

The Schlote Psychotherapy Professional Corporation and its agents and representatives work towards developing, implementing, and maintaining best practices and strategies to enhance the 5 principles of social justice in the EQUUSOMA® training program. This includes but is not limited to the following goals, which are at varying levels of implementation.

Discrimination and Harassment Aspirations

- Communicating our position on discrimination and harassment to EQUUSOMA® community members.
- Surveying community members about our diversity and inclusion efforts, and about any personal experiences of discrimination and/or harassment in the context of their work with EQUUSOMA®.
- Meaningfully supporting team members and students who experience disrespectful and discriminatory treatment within the EQUUSOMA® community.
- Conducting exit interviews where possible/appropriate to determine whether any overt or subtle forms of discrimination played a role in their decision to leave, to identify actions for improvement.

Progress to date:

- Integrating the recognition of discrimination towards various groups and the felt sense experiences of oppressed nervous systems into the curriculum, along with fostering the felt sense of safety and inclusion for all nervous systems.
- Encouraging inclusive language, the recognition of privilege, and correcting the inadvertent use of expressions that may have unintentional discriminatory connotations.
- Modeling the importance of being receptive to feedback without defensiveness, and taking steps towards relational repair and accountability when ruptures or incidents occur.

- Providing debriefing and follow-up support to team members and students in relation to situations pertaining to diversity and inclusion.

Team Member Recruitment and Retention Aspirations

- Ensuring team member demographics show representation from multiple categories of identity, with ongoing efforts to recruit, retain, and promote individuals of under-represented groups.
- Encouraging personal and professional development for team members related to privilege, implicit biases, discrimination and harassment, and social justice.
- Indicating our commitment to diversity and inclusion on our website, social media, and in our recruitment efforts.
- Supporting team members through measures that enhance retention and satisfaction in their roles, including reasonable accommodations and support measures.

Progress to date:

- Ensuring representation of diversity amongst EQUUSOMA® team members in relation to language, gender identity, sexual orientation, age, religion, body shape, and neurodivergence. We strive for greater representation pertaining to race/ethnicity.
- Sharing resources with team members pertaining to social justice, implicit biases, privilege, discrimination, and steps to take to create change.
- Including descriptions outlining our commitment to diversity, inclusion, and social justice in our website and social media write-ups and posts.
- Seeking advice about ways to locate prospective team members from diverse communities given the specific scope of practice criteria required of EQUUSOMA® team members.
- Providing flexible work hours and locations for employees and contractors that allow them to meet their various personal and family obligations, physical and emotional health needs, and executive functioning needs.
- Covering the cost of lunches for volunteer training assistants at Level 2 Practice Modules.
- Implementing an honorarium for faculty-in-training for co-teaching efforts while learning.

Team Member Performance Management and Advancement Aspirations

- Developing clear written and communicated performance management policies and ensuring that performance reviews are conducted regularly on a set schedule, as well as on an as-needed basis.
- Outlining clear parameters and guidelines for team members pertaining to their roles in the EQUUSOMA® program, including expectations with regards to diversity, inclusion, and social justice.
- Developing clear criteria for evaluating candidates for more advanced positions.
- Ensuring that those in decision-making roles have had diversity and inclusion training.

Progress to date:

- EQUUSOMA® founder involvement in various online groups and presentations pertaining to diversity and inclusion practices; safe and effective use of self; and self-reflection and personal study in the areas of social justice, privilege, and implicit bias.
- Developed and disseminated lengthy assisting team guidelines outlining expectations around the assistant role and social justice considerations. These guidelines are shared with every assisting team at the start of each new cohort.
- Broaching topics pertaining to social justice, discrimination, and inclusion during team meetings to encourage deeper integration of these concepts beyond performative allyship.
- Seeking consultation on the development of performance reviews on specific criteria for various roles within the EQUUSOMA® team.

Student Experience Aspirations

- Identifying opportunities to increase access to the EQUUSOMA® training of historically under-represented and marginalized groups.

- Providing reasonable accommodations and support measures to students to assist them in progressing through the EQUUSOMA® training.
- Team members overtly modeling diversity inclusion practices and attitudes during training modules to help support an atmosphere of safety and belonging.
- Adapting our curriculum to be more aligned with diversity and inclusion principles, so that students from various identity groups experience a sense of visibility, representation, and inclusion.

Progress to date:

- Implementing an Inclusion Scholarship Program (pages 26-27) to support students facing economic disparities related to racism and racialized trauma or other variables.
- Using the live transcription feature in Zoom so that the audio is simultaneously available in text format during the online training components.
- Putting the Level 1 training entirely online, and ensuring the additional requirements for Level 1 can also be completed online, which accommodates individuals for whom travel may be unaffordable or inaccessible.
- Encouraging students requiring accommodation for particular needs to contact us so that we can identify solutions.
- Encouraging students to recognize their needs and see what changes when they follow their impulse to invite more comfort and support and not override during the training program, as part of reconnecting with agency and their thresholds based on their varying capacity in the moment.
- Having clear forms and instructions outlining informed consent, choice, and self-determination, and highlighting specific instances where there are limits to choices and why.
- Having some of our materials translated into various languages, and ensuring that the majority of our required readings have various translations available.
- Team members disclosing pronouns, providing land acknowledgments, and acknowledging the particular adverse experiences and needs of various groups to provide education and broaden student perspectives.
- Providing instruction and modeling on the importance of recognizing our privilege, examining our implicit biases, and being open to feedback.
- Aiming for greater representation in our training materials (e.g., using images depicting people from various identity communities where available).
- Ensuring that refreshments, snacks, and lunch options available at Level 2 trainings accommodate a variety of dietary needs and nutritional preferences.

Policy and Procedure Development Aspirations

- Intentionally seeking input from members of identity community groups to guide the development of policies and procedures for EQUUSOMA®.
- Revising policies and procedures based on team member and student feedback.
- Aligning policies and procedures with relevant legislation, where applicable.

Progress to date:

- Consulted with colleagues and peers in the BIPOC, 2SLGBTQIA+, disability, and neurodivergent communities with regards to policies and procedures related to inclusion and accessibility.
- Reviewed relevant legislation and international standards pertaining to human rights, accessibility, employment standards, and trauma-informed practice.
- Regularly adapting policies and procedures following feedback from team members and students to reduce complications, create more streamlining, and reduce barriers while balancing the need for quality control and scope of practice considerations.

Additional goals may be added over time, as progress towards these goals unfolds and identifies other areas of growth and improvement. If students have any feedback or questions, please see the Feedback and Disputes Policy (pages 66-67).

Payment and Refund Policy

Please note: Refunds in the amount of discounts (whether new or currently outlined in the Policy Handbook) are not applied retroactively. If a student is eligible for a discount and does not contact info@equusoma.com for a custom invoice with a discount code or if a student forgets to enter the discount code at the checkout, no refund or credit will be issued for that amount.

Level 1 Program

Fees and Payments

Completing the registration form and student agreement and submitting payment by the stated deadlines is required to hold your spot in the Level 1 training program. It is possible to pay for your tuition in instalments, provided that the registration fee is received in full by the stated deadlines. The cost of the Level 1 program in 2024 is \$5,100 CAD, and the fee is subject to change in future years. Canadian students are subject to the provincial or territorial tax where they reside. For students residing outside of Canada, no Canadian tax applies.

Level 1 registration fees cover the cost of tuition, which includes access to the videos for Theory Modules 1, 2 and 3, attendance at the live online Practice Modules 1 and 2, handouts, certain additional readings (those that are in PDF form), and the bonus features (live monthly Q&As during Theory Module 1, and live monthly Q&As and Demonstrations during Theory Modules 2 and 3).

Students are responsible for paying for their log hours, books that are required reading, any make-up time, and any other incidental expenses related to the Level 1 program, if applicable, at their own cost separate from their tuition.

Returning Students

Returning students may re-take/audit a Practice Module as a refresher [at a reduced rate](#), provided there is space in a given cohort. Students will contact info@equusoma.com to obtain a custom invoice with the rate in place at the time of the student's request. Additional details about specific accommodations offered to 2019-2023 students are listed in the Special Accommodations section on pages 49-51. Priority for registration goes to students who have not previously taken the Practice Module in question and/or students who are required to take the Practice Module in order to complete the program within the timeframe and deadline parameters listed in this document. Priority in the practice rounds will be for new students to be in the practitioner and lender roles, with auditing students in the observer role.

Teams and Groups

Students who register with a person they co-facilitate services with each receive [10% off](#) the total Level 1 tuition. If a group of 3-6 people from the same organization attends, each person obtains [20% off](#) the total Level 1 tuition. If a group of 3 people registers and one person withdraws, the remaining 2 people obtain the 10% discount and the difference in rate will be billed to the students who attend. Each student must individually pay their tuition, and we do not process payments for multiple registrants in a single transaction.

Refunds

Students can cancel Level 1 at any time, and the refunds depend on the date of cancellation:

CANCELLATION BY LEVEL 1 STUDENT			
Cancelling before the program begins	Cancelling after the start of Theory Module 1 before Day 1 of Theory Module 2	Cancelling after the start of Theory Module 2 before Day 1 of Theory Module 3	Cancelling after the start of Theory Module 3
100% of what the student paid minus a \$100 CAD admin fee	What the student paid minus 1/3 of the total Level 1 tuition, minus a \$100 CAD admin fee	What the student paid minus 2/3 of the total Level 1 tuition, minus a \$100 CAD admin fee	No refunds

If the Schlote Psychotherapy Professional Corporation or its representatives need to cancel any aspect of the Level 1 training program, the above refund schedule applies without any administration fee. No refunds are offered in the event that any Level 1 Bonus Feature is cancelled or rescheduled. No refunds are offered if a Level 1 live Practice Module is rescheduled to a different date. The Schlote Psychotherapy Professional Corporation is not liable or responsible for any fees, incurred expenses, or lost wages incurred as a result of a student having to reserve time to complete any component of the training program should it be cancelled or rescheduled or should the student withdraw from any training component.

Please see the Program Completion Policy (pages 45-51) and the Attendance and Make-Up Policy (pages 52-56) for additional information.

If for whatever reason we need to cancel a Level 1 training in its entirety, you will receive a [full refund](#) of the registration fee that you have paid (or a [pro-rated refund](#) if the program has started and the remainder must be cancelled due to extenuating circumstances).

In no event shall any liability of the Schlote Psychotherapy Professional Corporation, its officers, directors, employees, shareholders, agents, or representatives arising out of any claim related to the Student Agreement and the policies thereunder exceed the aggregate amount paid by the student to the Schlote Psychotherapy Professional Corporation on account of student and/or participation or tuition fees for the EQUUSOMA® program. The Schlote Psychotherapy Professional Corporation shall not be held liable for any losses or damages incurred by the student including lost wages or fees (including but not limited to travel and accommodation), whether known or unknown, however incurred should any EQUUSOMA® event or activity be cancelled. We apologize for any inconvenience and appreciate your understanding when circumstances are beyond our control.

Level 2 Program

Fees and Payments

Completing the registration form and student agreement and submitting payment by the stated deadlines is required to hold your spot in the Level 2 training program. It is possible to pay for your tuition in instalments, provided that the registration fee is received in full by the stated deadlines. The cost of the Level 2 program in 2024 is \$5,100 CAD, and the fee is subject to change in future years. For the recordings of Level 2 Theory Modules 1 and 2, Canadian students are subject to the provincial or territorial tax where they reside; for students residing outside of Canada, no tax applies for these online modules. For Level 2 Practice Modules held in Canada, all students will be charged the tax that is applicable to the province or territory in which the Practice Modules are located. For Practice Modules held outside of Canada, no Canadian tax applies.

Level 2 registration fees cover the cost of tuition, which includes access to the videos for Theory Modules 1 and 2, attendance at Practice Modules 1 and 2 (including notepads, pens, and refreshments), handouts, and certain additional readings (those that are in PDF form).

Students are responsible for paying for their log hours, books that are required reading, travel costs, accommodations, meals, and any other incidental expenses related to the Level 2 program, if applicable, at their own cost separate from their tuition.

Returning Students

Returning students may re-take/audit a Level 2 Practice Module as a refresher [at a reduced rate](#), provided there is space in a given cohort. Students will contact info@equusoma.com to obtain a custom invoice with the rate in place at the time of the student's request. Additional details about specific accommodations offered to 2019-2023 students are listed in the Special Accommodations section on pages 49-51. Priority for registration goes to students who have not previously taken the Practice Module in question and/or students who are required to take the Practice Module in order to complete the program within the timeframe and deadline parameters listed in this document. Priority in the practice rounds will be for new students to be in the practitioner and lender roles, with auditing students in the observer role.

Teams and Groups

As of 2024, **discounts are no longer available for groups of 3 or more registering together for Level 2 in the same calendar year.** Discounts are still available for co-facilitation pairs at Level 2, but at a lower rate reflective of the higher expenses involved with running trainings in person at equine facilities. Students who register with a person they co-facilitate services with each receive [5% off](#) the total Level 2 tuition. Each student must individually pay their tuition, and we do not process payments for multiple registrants in a single transaction.

Refunds

Refunds are only possible if part or all of the Level 2 training components need to be cancelled or rescheduled due to extenuating circumstances by the program administration. [No refunds are possible](#) if a student needs to withdraw from Level 2 for whatever reason, due to the higher cost of overhead at equine facilities and the lower number of students we can accommodate at each in-person Practice Module. Please see the Attendance and Make-Up Time Policy (pages 52-56) for refund details as well as for additional options should a student happen to miss part or all of a Level 2 Practice Module.

The deadlines of the Program Completion Policy (pages 45-51) still apply.

The Schlote Psychotherapy Professional Corporation and its agents and representatives are not liable or responsible for any lost wages or fees (including but not limited to travel and accommodation) incurred as a result of having to reserve time to support any EQUUSOMA® event or activity should they be cancelled. We apologize for any inconvenience and appreciate your understanding when circumstances are beyond our control.

Please see the Feedback and Disputes Policy (pages 66-67) for further details. Deadlines and ability to offer certain accommodations are subject to change at the sole discretion of the Schlote Psychotherapy Professional Corporation. The term regarding Force Majeure Event (page 48) applies.

Pricing Policy for Log Hours and Make-Up Time

Approved providers, assistants, and faculty set their own fees when offering services to students (such as make up time, personal SE™ sessions, and consultations), which reflect their respective degrees of experience and expertise, expenses, cost of living, currency value, and are comparable to other professionals offering similar services in their broader geographic regions.

The individual's regular rate or fee reflects the true cost of offering that service for that individual. These fees average anywhere from \$100/hr to \$175/hr CAD, with some rates below and above this range. Some providers may need to charge taxes.

Accessibility and Sliding Scales

When approved providers are available to offer personal sessions or consultations during a Level 1 or Level 2 Practice Module (such as before class, on the longer break, or after class), those providing these services may choose to agree on a common fee for the duration of that particular event, but this is not a requirement. If a common fee is chosen for the duration of the Practice Module, Providers may resume charging their regular rate afterwards. Charging a common fee may limit some providers' ability to offer a sliding scale to those who may benefit from it.

Whether a professional charges their regular rate, a sliding scale rate, or a common rate agreed upon by the other providers at a particular training, the fees must strive to reflect both a fair compensation for the professional's service as well as affordability for students whose financial resources may vary. However, some team members may not currently have space available and there may be a waitlist involved in accessing services that are offered on a sliding scale or that are offered pro bono (without a fee).

Paying an approved provider's full rate, when a student is financially able to do so, may allow some providers to offer a sliding scale to others who are facing financial limitations. For more information about values that may guide the use of sliding scales, please see pages 26-27.

Program Completion Policy

The following terms have been updated and modified to align with the changes in our Level 1 program as a result of transitioning to our new eLearning portal in September 2023. This replaces the previous policy.

There are two main pathways through the EQUUSOMA® training program. All students are automatically in the first pathway (training components only) when they join the program. The second pathway (Certificate Track) applies to students who wish to go that route.

1. **Training Components Only:** Students may register for the EQUUSOMA® program and only complete the training components (Theory and Practice Modules) without completing the additional requirements (or only completing partial additional requirements). Students who are in this pathway will receive a certificate of completion for the training components they have completed.
2. **Certificate Track:** The Certificate Track requires students to complete a certain number of personal sessions of Somatic Experiencing®, case consultations, assignment consultations, and other requirements as described in the Roadmap (page 7) and in the Training Process (page 6). Level 1 and Level 2 Certificates of Completion and the EQUUSOMA® Practitioner designation are only awarded when these additional requirements are met.

Training Components Only

Students must complete all the Level 1 training components (pre-recorded Theory Modules and experiential Practice Modules) prior to attending Level 2. Students do not need to decide if they want to join the Level 1 Certificate Track at the time of registering for Level 1. As a result, completion of a certain number of personal sessions and consultations is **no longer required** in order to attend Level 2 training components. However, we highly recommend and encourage that students spread out their sessions and consultations throughout each level to maximize their benefit in support of the integration of the learning.

Students that experience delays in the program for whatever reason will need to complete the program based on the length and rates that are in place at that time they resume the training, even if these are different from when the student originally joined the program.

Prior students are welcome to audit any upcoming Level 1 or 2 Practice Module at a reduced rate if space is available, and must contact info@equusoma.com for an invoice for the rate that is in place at the time of their request. Priority for registration goes to students who have not previously taken the Practice Module and/or students who are required to take it in order to complete the program within the timeframe and deadline parameters listed in this document. Priority in the practice rounds will be for new students to be in the practitioner and lender roles, with auditing students in the observer role.

2019-2023 students: Please see the Special Accommodations section (pages 49-51) pertaining to students who registered for EQUUSOMA® training between 2019-2023 to learn more about updated accommodations regarding program requirements, deadlines, and deferrals.

Reasonable accommodations may apply in cases of accessibility.

Changing Cohorts – Level 1

Students are encouraged to remain with their original cohorts for all of Level 1, and to pick the same time zone option when attending each Practice Module. This helps to build connections within the group, increases cohesiveness for Practice Modules, and facilitates reaching out for support and networking, such as the possibility of creating peer study groups (which are not a requirement but can be a useful way to help further

integrate the material). Remaining with the same cohort is also generally the quickest way to complete Level 1, as changing cohorts (for e.g., deferring to the following year to complete Level 1) will incur further delays. However, students who must change cohorts for a variety of reasons may do so if there is space in another cohort, with the understanding that the deadlines outlined in the Program Completion Policy (pages 45-51) still apply. Please see the Payment and Refund Policy (pages 41-43) for more information.

Completing Level 1 Training Components

In the new eLearning portal, students must watch the Theory Module 1 videos before Theory Module 2 access is granted. Students must then watch the Theory Module 2 videos before being able to attend Practice Module 1 live online. Where possible, we aim to offer two different sets of dates for the Practice Modules to accommodate students in different time zones. If a student has not completed the Theory Module 2 videos by the stated deadline for the first Practice Module 1 offering, they can either request to be switched to the second Practice Module 1 offering (if applicable or available; this second offering may be in a time zone that is inconvenient) or they will have to defer their progress in the Level 1 program until the following calendar year when Practice Module 1 is offered again. The same policy applies to watching the Theory Module 3 videos in order to be eligible to attend Practice Module 2.

We highly encourage that students remain on track with their progression through Level 1 and respect the deadlines to prevent lengthy delays in their progression through the program.

This process applies to all students who complete Level 1 via the new student eLearning portal, regardless of the date they originally began the program. Any questions may be directed to liaison@equusoma.com.

Progressing to Level 2

Level 2 training features online modules and in-person experiential modules at a number of locations around the world. Currently, we offer Level 2 Practice Modules in Canada, the USA, France, and Australia. Locations and availability of Practice Modules may vary each year and are not a guarantee. The maximum number of students that can register to complete the Level 2 Practice Modules at a given location will depend on the number of equines at each location and their needs, the venue's capacity, and the number of training assistants available, etc. As a result, registration for Level 2 is on a first come, first served basis per cohort location.

Completing the Level 1 training components in a given year is **not** a guarantee that a student will automatically progress to Level 2 the following calendar year. There may be a delay between Level 1 and Level 2 depending on the variables outlined above.

Changing Cohorts – Level 2

Level 2 students **must attend all of their Practice Modules at the same venue/location**. It is not possible to change locations after completing Practice Module 1 to complete Practice Module 2 somewhere else, with the exceptions outlined in the Attendance and Make-Up Time Policy (pages 52-56) and Payment and Refund Policy (pages 41-43).

We require a minimum number of students attending at each location to hold the venue, and in-person events at equine facilities have much higher overhead costs than events that do not involve equines. For this reason, transferring registration fees from one cohort at one location to join another cohort at another location partway along is not possible. For future levels (e.g., Level 3 and beyond, in development), students may opt to do the Practice Modules of a different level at a different location, but the same rules apply (e.g., a student could opt to do all their Level 2 Practice Modules at one location, and all their Level 3 Practice Modules at a different location (should future levels become available), but the Practice Modules within each level must be completed at the same location, with some exceptions as outlined in the policies above).

Furthermore, the Level 2 Practice Modules may involve a greater sense of vulnerability for some students than meeting and practicing together online. Staying with the same cohort at the same location allows for familiarity, safety, and trust to be built, which can facilitate the learning process. Remaining with the same cohort is also the quickest way to complete Level 2. **Refunds are not possible for Level 2+ Practice Modules**, but a number of deferral options and completion timelines are available, outlined in the Payment and Refund Policy (pages 41-43) and in the Make-Up Time Policy (pages 52-56).

Completing Level 2 Training Components

In the new eLearning portal, students must watch the Level 2 Theory Module 1 videos before they can attend Level 2 Practice Module 1. Similarly, students must watch the Level 2 Theory Module 2 videos before they can attend Level 2 Practice Module 2. If a student is unable to attend a Level 2 Practice Module as planned, they must contact liaison@equusoma.com as soon as possible to discuss a course of action based on the variables that are in play at that time.

We highly encourage that students remain on track with their progression through Level 2 and respect the deadlines to prevent lengthy delays in their progression through the program. That said, we recognize that life circumstances may change and we will do our best to accommodate. However, students should understand that due to the additional logistics and costs involved in offering Level 2, the options available are more limited than at Level 1.

Program Abandonment

Any students that have had a 2-year gap or more between when they originally left off in the training program (defined as the last documented date of attendance at any training component) and later resume the program must contact liaison@equusoma.com to discuss re-entry. Resuming the program may involve specific fees and requirements based on their individual circumstances beyond those listed above. Please see the Recordings Policy (page 58) for more information.

Certificate Track

Certificate Track – Early Adopters: Students who decide prior to registration or early in Level 1 that they intend to follow the Certificate Track are encouraged to spread out their required log hours throughout Level 1, so that they can begin working on their assignment and book their 4 required assignment consultations once they have completed the Level 1 Theory Module 3 video recordings. We recommend that students who are taking this route complete their Level 1 assignment before beginning Level 2. This is the recommended route, so that the log hours support deeper integration of the learning and inform the assignment.

Certificate Track – Late Adopters: Students may decide later in Level 1, partway through Level 2, or after the Level 2 Practice Module 2 that they would like to do the Certificate Track. Should this occur, students will simply complete their required log hours as indicated with the following exception: Instead of completing 4 assignment consultations and submitting their Level 1 assignment before proceeding to Level 2 (as this no longer applies), students will simply wait until the end of the Level 2 training components (Theory and Practice Modules) and until they have completed their case consultations to begin working on their assignment. They will then book their 6 required assignment consultations (the number required for Level 1 and 2 combined) and final assignment review. This means that instead of submitting their assignment twice (the first time reflecting the integration of their knowledge of Level 1 after 4 assignment consultations, and the second time reflecting their integration of their knowledge of Level 2 after 2 assignment consultations and the final review), they will simply submit their assignment once after all the assignment-related log hours are completed.

The amount of effort involved in completing the assignment is the same regardless.

Program Completion and ESP Designation

The **minimum** amount of time in which a student can potentially complete the entire program is approximately 2 years. However, completing the program may take longer depending on different variables, such as the time needed to complete the various additional requirements, whether or not a student needs to change cohorts or take a leave of absence, whether or not a student is able to register for Level 2 the following calendar year based on availability, etc.

Students have an additional 2 years from the date they complete Level 2 Practice Module 2 (*an increase from the previous policy, which was 1 year*) to complete their additional requirements and obtain their Level 1 and Level 2 Certificates of Completion, and/or the ESP designation. Students who are unable to complete these requirements within this timeframe must book a consultation with the founder or a faculty member approved by the founder to discuss your circumstances and determine a potential course of action. This consultation time will not count towards your required consultation hours to complete the program. Reasonable accommodations may apply in cases of accessibility.

The Schlote Psychotherapy Professional Corporation shall not be deemed in breach of the EQUUSOMA® Student Agreement if the student is unable to complete the program or any portion thereof by reason of fire, earthquake, labor dispute, epidemic or pandemic, act of God or public enemy, death, illness or incapacity of the student or team or any local, provincial, federal, national or international law, governmental order or regulation or any other event beyond the Schlote Psychotherapy Professional Corporation's control (collectively, "**Force Majeure Event**"). Upon occurrence of any Force Majeure Event, the Schlote Psychotherapy Professional Corporation shall give notice to the student of its inability to perform or of any delay in completing the program and shall propose revisions to the schedule for completion of the program if possible.

2019-2023 students: Please see the Special Accommodations section on the following pages (adapted from the September 2022 edition of the Policies Handbook) to learn more about accommodations regarding program requirements.

Special Accommodations for 2019-2023 Students

The following section has been updated to reflect the new student eLearning portal launching in 2024.

Please note: If you are a past student who did not take advantage of the accommodations that were set out in the previous edition of the Policies Handbook released on October 31, 2022, and you wish to return to return to continue the training in 2024 or beyond, **the following updated accommodations now apply and replace the previous accommodations**. It is no longer possible to complete the training components in their previous formats.

Students from 2019-2023 who have completed Level 1, please skip to the section below about Level 2.

1. **Training Components Only**

All students from 2019-2023 who will not have completed Level 1 prior to the eLearning portal going live in January 2024 who intend to continue with the EQUUSOMA® program must complete Level 1 in the format that exists at the time they resume the program, in order to ensure they are prepared for the Level 2 Practice Modules. Students who completed certain Level 1 modules prior to 2024 will be granted access free of charge to the latest video recordings of the teaching material (from 2023) of those modules via the new portal, as outlined below (some conditions apply). Additional circumstances are outlined below. Reasonable accommodations beyond the parameters below may apply in cases of accessibility.

Level 1 Theory Module 1 (formerly called Fundamentals I):

- **2019 Basics students** who have not yet completed Theory Module 1 will access the video recordings in the portal **at a discounted rate**, prior to proceeding to the next module in the program, provided they have registered and paid (in full or began paying in instalments) for the remainder owing for the Level 1 program. These students will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program.
- **Students who completed Theory Module 1 in either 2020, 2021, or 2022** must contact us to access the video recordings **free of charge** to review them prior to proceeding to the next module, provided they have registered and paid (in full or began paying in instalments) for the remainder owing for the Level 1 program.
- **Students who completed Theory Module 1 in 2023** may access the video recordings **free of charge**. The recordings currently used in the eLearning portal are from the 2023 student cohort.

Level 1 Module 2 (formerly called Foundations of Somatic Experiencing®):

- **2019 Basics and 2020 students** who have not yet completed Theory Module 2 must contact us to access the video recordings in the portal **free of charge** and watch them prior to proceeding to the next module in the program, provided they have registered and paid (in full or began paying in instalments) for the remainder owing for the Level 1 program. These students **must also attend Practice Module 1 at a discounted rate** and will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program, if there is space.
- **Students who completed Theory Module 1 in 2021-2023 but did not proceed to Theory Module 2** must continue with the new eLearning portal and pricing in place at the time they resume the program, and contact info@equusoma.com for a custom invoice reflecting the amount left owing for the remainder of the Level 1 program.
- **Students who completed Theory Module 2 in 2021 and 2022** must contact us to access the video recordings **free of charge** to review them prior to beginning the next module, provided they have registered and paid (in full or began paying in instalments) for the remainder owing for the Level 1 program. All 2021 and 2022 students (and any students who have had a 2-year gap or more between when they originally completed this module and later resume the program) **must also**

[attend Practice Module 1 as a refresher at a discounted rate](#), and will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program, if there is space. Priority for registration goes to students who have not previously taken the Practice Module, and priority in the practice rounds will be for new students to be in the practitioner and lender roles.

- **Students who completed Theory Module 2 in 2023** may access the video recordings [free of charge](#). The recordings currently used in the eLearning portal are from the 2023 student cohort. If there is a 2-year gap or more between when 2023 students originally completed this module and later resume the program, they [must also attend Practice Module 1 as a refresher at a discounted rate](#). Students will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program, if there is space. Priority for registration goes to students who have not previously taken Practice Module 1, and priority in the practice rounds will be for new students to be in the practitioner and lender roles.

Level 1 Module 3 (formerly called Fundamentals II):

- **2019 Basics students** who have not yet completed Theory Module 3 will access the video recordings in the portal [at a discounted rate](#), prior to proceeding to Level 2, provided they have registered and paid (in full or began paying in instalments) for the Level 2 program. These students will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program. These students [must also attend Practice Module 2 at a discounted rate](#) and will contact info@equusoma.com for an invoice for the rate that is in place at the time they resume the program, if there is space.
- **Students who completed Theory Module 2 in 2021-2023 but did not proceed to Theory Module 3** must continue with the new eLearning portal and pricing in place at the time they resume, and contact info@equusoma.com for a custom invoice reflecting the amount left owing for the remainder of the Level 1 program.
- **Students who completed Theory Module 3 in either 2020, 2021, or 2022** must contact us to access the video recordings [free of charge](#) to review the most up to date material prior to beginning Level 2, provided they have registered and paid (in full or began paying in instalments) for the Level 2 program. Any students who have had a 2-year gap or more between when they originally completed this module and later resume the program [must also attend Practice Module 2 as a refresher at a discounted rate](#), and will contact info@equusoma.com for an invoice for the rate that is in place at the time of their request, if there is space. Priority for registration goes to students who have not previously taken Practice Module 2, and priority in the practice rounds will be for new students to be in the practitioner and lender roles.
- **Students who completed Theory Module 3 in 2023** are also eligible to access the video recordings [free of charge](#). The recordings currently used in the eLearning portal are from the 2023 student cohort. If there is a 2-year gap or more between when 2023 students originally completed this module and later resume the program, they [must also attend Practice Module 2 as a refresher at a discounted rate](#). Students will contact info@equusoma.com for an invoice for the rate that is in place at the time of their request, if there is space. Priority for registration goes to students who have not previously taken Practice Module 2, and priority in the practice rounds will be for new students to be in the practitioner and lender roles.

Note: Any 2019-2023 students who have had a 2-year gap or more between when they originally left off in the training program (defined as the last documented date of attendance at any training component) and later resume the program must contact liaison@equusoma.com to discuss re-entry. Resuming the program may involve specific fees and requirements based on their individual circumstances beyond those listed above. Please see the Recordings Policy (page 58) for more information.

Level 2:

- Students who completed both Level 2 Practice Modules in either 2022 or 2023 will contact info@equusoma.com to access the recordings of the new Level 2 Modules 1 and 2 video recordings **free of charge**.
- Students who completed the first Level 2 Practice Module in 2023 whose second Practice Module is not slated until 2024 will also contact info@equusoma.com to access the recordings of the new Level 2 Theory Modules 1 and 2 video recordings **free of charge**, provided they have registered and paid (in full or began paying in instalments) for Practice Module 2. Watching these recordings is required prior to attending Practice Module 2.
- Students who completed the Level 1 training components and have yet to move on to Level 2 will do so via the eLearning portal with the pricing in place at the time they register.

2. Certificate Track

All students from 2019-2023 who completed some or all of their log hours and assignment based on previous requirements (prior to the previous edition of the Policies Handbook coming into effect on October 31, 2022) will not have to re-do those hours, with the exception of the change in approval level of approved providers that was previously implemented on March 3, 2021 (please see Non-Approved Providers section on page 20 for more information). Any incomplete requirements left outstanding as of October 31, 2022 must be completed according to the policies outlined in the current 2023 edition of the Policies Handbook. Reasonable accommodations beyond the parameters below may apply in cases of accessibility.

3. Deadlines

Access to these accommodations is being offered until the following deadlines based on when students began their involvement with EQUUSOMA®. Students who have not completed their Level 1 requirements by these deadlines will need to resume the process at Level 1 at the full rate and complete whatever requirements are in place at that time:

- 2019 Basics students: December 31, 2024
- 2020 students: December 31, 2025
- 2021 students: December 31, 2026
- 2022 students: December 31, 2027
- 2023 students: December 31, 2028

Deadlines and ability to offer certain accommodations are subject to change at the sole discretion of the Schlote Psychotherapy Professional Corporation. The term regarding Force Majeure Event (page 48) applies.

Attendance and Make-Up Time Policy

The following terms have been updated and modified to align with the changes in our Level 1 program as a result of transitioning to our new eLearning portal in September 2023. This replaces the previous policy.

The EQUUSOMA® training program emphasizes the principles of trauma-informed practice wherever possible, as well as the recognition of needs, thresholds, and boundaries. Through our new eLearning portal, students can watch the pre-recorded Theory Modules around their pre-existing work and personal commitments and needs. The live experiential Practice Modules, however, cannot be made up through videos, and missed time needs to be made up.

This results in a paradox, where on the one hand we encourage students to recognize and voice their needs and to express agency in relation to having choice (which may include missing some pieces in order to rest and not override too much), while on the other hand missing live experiential components affects integration of the material and risks short-changing students in their learning. In other words, tending to one's needs is trauma-informed. By that same token, it would be unethical to receive a certificate of completion of a particular training component if someone has missed essential practical parts that are critical in order to apply what one has learned in a trauma-informed way.

One of the dialectics of trauma is that two opposites can be true at the same time: in this case, there are conflicting needs and boundaries, each of which are worthy of respect. The following Attendance and Make-Up Time Policy reflects our best attempt at navigating this paradox in an as trauma-informed way as possible.

Please see the Program and Completion Policy (pages X-Y), the Recordings Policy (page 58), and the Payment and Refund Policy (pages 41-43) for additional applicable information. Deadlines and ability to offer certain accommodations are subject to change at the sole discretion of the Schlote Psychotherapy Professional Corporation. The term regarding Force Majeure Event (page 48) applies.

Level 1 Practice Modules

Experiential learning takes place on Zoom during Practice Modules 1 and 2, which are not possible to complete via recording and must be attended live in real time.

Student Extenuating Circumstances

On occasion, students may have important scheduling conflicts that cannot be avoided, or may be absent due to variables beyond their control (e.g., an internet, power, or Zoom service outage, medical emergency, etc.). [Students may miss up to a maximum of 1 full day per 4-day Level 1 Practice Module](#) (whether one entire day, or the equivalent number of hours spread across the 4 days) [without having to make up the time](#). While not a replacement for direct practice and not an equivalent, the additional live Q&As and Demonstrations offered as bonus features that were not available previously now help bridge the gap should students need to be absent due to unforeseen circumstances.

If students miss more than the equivalent of 1 full day per Practice Module, they have the option of either:

1. Requesting to attend a different offering of the Practice Module within the same calendar year (if available or applicable, and if there is space) to make up the missed time, [at a reduced rate \(no refunds apply for the first attempt at completing the Practice Module where they missed more than 1 day\), or](#)
2. Hiring a faculty member or training assistant from their cohort to [make up the time, at this person's hourly rate, at the student's own additional cost, following the end of the Practice Module](#), if they want

to proceed with their existing cohort within the current calendar year and avoid delays (this is the more common route, as option 1 is not always a possibility). Making up the time can either be accomplished by (a) other students who also missed time collaborating by splitting the fees in order to complete the make-up time together, or (b) a single student bringing one or two people to the make-up time appointment(s) to act as lenders for the student to practice with.

Reasonable accommodations may apply in cases of accessibility.

If students miss a Practice Module in its entirety, please see the Program Completion Policy (pages 45-51) for when a student falls behind in watching the pre-recorded videos and is unable to attend a Practice Module in its entirety. That same policy applies if a student has completed the pre-recorded videos and is unable to attend an entire Practice Module for whatever reason.

Faculty Extenuating Circumstances

On occasion, a Practice Module may be affected by reasons beyond our control, such as due to faculty illness or emergency, or a technical issue (e.g., an internet, power, or Zoom service outage). In these cases, we may need to adjust some or all of the dates of a particular Practice Module. The revised dates may not work with a particular student's availability. Depending on when the Practice Module was affected (before or after it began), the following options are possible.

If students are unable to attend the revised dates live and still wish to complete Level 1 within the same calendar year, they may switch to a different offering of that Practice Module (if available or applicable, and if there is space).

If that is not possible, two remaining options are available:

1. The student may defer their registration and the remainder of their registration fees (**without penalty or administrative fees, at no additional cost**) to the cohort taking place **in the following calendar year** to re-take that Practice Module and continue the program from that point, even if they have already completed a portion of the existing Practice Module the previous calendar year, to avoid incurring additional fees. This option will result in delays in the student's progression in the program. Students who select this route must do so knowing that the Program Completion Policy (pages 45-51) still applies. We make no guarantees about the availability or dates of future cohorts.
2. If a student is unable to roll their registration fee to a different cohort within this 1-year grace period to complete the rescheduled or interrupted training component and proceed to the next one, we will issue a **100% refund** due to the inconvenience (if the module had to be rescheduled entirely) or a **partial refund** (pro-rated based on the days that the student attended before the interruption), without any administrative fee.

The made-up time may differ from what was learned by the students in the cohort who attended the whole Practice Module by virtue of the variables in place at the time at which the student does the make-up time.

Completing the make-up time is required before being granted a certificate of attendance or completion for the training component at hand. Similarly, it is not possible to progress to the next training component in the program if make-up time is not completed. Making up the time can either be accomplished by (a) other students who also missed time collaborating by splitting the faculty member or training assistant's fee in order to complete the practice rounds together, or (b) a single student bringing one or two people to the make-up time appointment(s) to act as lenders for the student to practice with.

Level 2+ Practice Modules

Experiential learning takes place in person with equines during Level 2 Practice Modules 1 and 2, which are not possible to complete via recording and must be attended live in real time. While some components of the Level 2 Practice Modules may be recorded, these recordings are not available at the present time.

Student Extenuating Circumstances

Students may miss up to a maximum of one full day per 5-day Level 2 Practice Module (whether one entire day, or the equivalent number of hours spread across the 5 days) without having to make up the time. A team member will provide a summary to the student on what was missed.

Students who miss more than 1 day of a Level 2 Practice Module (whether full days, or the equivalent number of hours spread across the 5 days) are welcome to stay and complete the remainder of the Practice Module since they have already paid, but they will need to make up the time that was missed.

Due to the higher overhead expenses involved in running in-person trainings at equine facilities at various international locations, refunds are not possible if a student must withdraw from or miss time from a Level 2 Practice Module and must make up that time. Reasonable accommodations may apply in cases of accessibility.

If the student would like to complete Level 2 within the same calendar year, they can inquire about either of the following options:

1. Making up the time in question by hiring the faculty member that taught the Level 2 Practice Module to book a private in-person make-up training at the student's own additional cost, at the faculty member's rate (including other applicable fees, such as venue, travel, etc.), if available. Not all faculty members may be able to accommodate this request, and this option is not a guarantee. When this option is available, making up the time can either be accomplished by (a) other students who also missed time collaborating by splitting the fees in order to complete the make-up time together, or (b) a single student bringing one or two people to the make-up time appointment(s) to act as lenders for the student to practice with.
 - ***If the original faculty member is not available, the student may inquire if a different faculty member is available to offer this option. That backup faculty member will need to be informed by the original faculty member who taught that student what components were missed so they know what to cover.*
2. Attending that same Level 2 Practice Module at a different location occurring that same calendar year, at a reduced rate, if space is available at that other location. Students will contact info@equusoma.com to inquire and request a custom invoice for the rate that is in place at the time they request this option. Students would need to attend the entire additional Practice Module due to the group process that unfolds at each Practice Module.

If neither option is possible, students may re-register to attend that same Level 2 Practice Module the following calendar year with a different cohort at the same location or at a different location. See the Payment and Refund Policy (pages 41-43) for details about fees.

The made-up time may differ from what was learned by the students in the cohort who attended the whole Practice Module by virtue of the variables in place at the time at which the student does the make-up time.

If the time was missed during Level 2 Practice Module 1, the time would need to be made up prior to attending Practice Module 2. If the time was missed during Practice Module 2, it would need to be made up

prior to beginning the assignment consultations (if on the Certificate Track). Completing the make-up time is required before being granted a certificate of attendance or completion for the training component at hand.

Students who miss Level 2 Practice Module 1 in its entirety for whatever reason (such as not having completed the associated pre-requisite Level 2 Theory Module 1 in time, or due to extenuating circumstances) will either transfer their registration (and remaining portion of their paid Level 2 tuition) to another Practice Module 1 being offered at that **same location** in the same calendar year (if applicable or available), or in the following calendar year (if applicable or available). A **surcharge** (equivalent to 25% of the total Level 2 registration fee) will be applied to assist with some of the expenses incurred due to holding a spot that might not be filled with someone else in the student's original cohort at the original chosen location. The student would then continue the program based on the dates of the new cohort that the student joined.

- If the student does not re-register for another offering of the missed Practice Module 1 within the same calendar year or the following calendar year at that same location, their registration fee will be retained and they must contact info@equusoma.com to request a custom invoice for the cost of Practice Module 1 at the full rate. At that time, they may choose to register at an entirely different location for their Level 2 Practice Modules, or at the same one. The 25% surcharge must also be paid when re-registering if this has not been paid previously.
- If due to unforeseen circumstances, Practice Modules cease being offered at that particular location within the 1-year grace period, the student will be able to roll their registration fee to a Practice Module 1 being offered at any other location within the 1-year grace period. If the student does not register at a different location within that time period, their registration fee will be retained and they must re-register for the Level 2 Practice Modules at the full rate. The 25% surcharge must also be paid when re-registering if this has not been paid previously.

Students who miss Level 2 Practice Module 2 in its entirety for whatever reason (such as not having completed the associated pre-requisite Level 2 Theory Module 1 in time, or due to extenuating circumstances) will either transfer their registration (and remaining portion of their paid Level 2 tuition) to another Practice Module 2 being offered at that **same location** in the same calendar year (if applicable or available), or in the following calendar year (if applicable or available). A **surcharge** (equivalent to 25% of the total Level 2 registration fee) will be applied to assist with some of the expenses incurred due to holding a spot that might not be filled with someone else in the student's original cohort at the original chosen location. The student would then continue the program based on the dates of the new cohort that the student joined.

- If the student does not re-register for another offering of the missed Practice Module 2 within the same calendar year or the following calendar year at that same location, their registration fee will be retained. At this point, they must re-register for and audit Practice Module 1 as a returning student (at **a reduced rate, via custom invoice, provided there is space**) before registering Practice Module 2. Since the student will need to re-take Practice Module 2, they may opt to do so at the same location or start over at a different location to complete both modules. The 25% surcharge must also be paid when re-registering if this has not been paid previously.
- If due to unforeseen circumstances, Practice Modules cease being offered at that particular location within the 1-year grace period, the student will be able to roll their registration fee to a Practice Module 2 being offered at any other location within the 1-year grace period. If the student does not register at a different location within that time period, their registration fee will be retained. At this point, they must re-register for and audit Practice Module 1 as a returning student (at **a reduced rate, via custom invoice, provided there is space**) before registering for Practice Module 2. Since the student will need to re-take Practice Module 1, they may opt to do so at the same location or start

over at a different location to complete both modules. The 25% surcharge must also be paid when re-registering if this has not been paid previously.

Priority for registration goes to students who have not previously taken the Level 2 Practice Module in question and/or students who are required to take the Practice Module in order to complete the program within the timeframe and deadline parameters listed in this document. Priority in the practice rounds will be for new students to be in the practitioner and lender roles, with auditing students in the observer role.

Faculty Extenuating Circumstances

On occasion, a Level 2 Practice Module may be affected by reasons beyond our control, such as due to faculty illness or emergency, travel advisories impacting the region where a Practice Module is being held, venue-related issues, and so on. In these cases, we may need to adjust some or all of the dates of a Practice Module, depending on when the issue occurred. The revised dates may not work with a particular student's availability. If a student is unable to attend the revised dates, **the following options are possible:**

1. A student may defer their registration and the entirety of their registration fee payment (**without penalty or administrative fees, at no additional cost**) to a future cohort taking place **in the next 2 years** (from the start date of the Practice Module that was cancelled, interrupted, or rescheduled) at **any available location** to re-take that Practice Module where there is space, even if they have already completed a portion of the Practice Module. Students who select this route must do so knowing that the Program Completion Policy (pages 45-51) still applies. We make no guarantees about the availability or dates or locations of future Practice Modules.
2. If a student is unable or unwilling to roll their registration fee to a different cohort within this 2-year grace period to complete the rescheduled or interrupted Practice Module and proceed to the next step in the training, we will issue a **partial refund** due to the inconvenience (if the Practice Module had to be rescheduled entirely, or pro-rated based on the days that the student attended before the interruption). The refund will depend on where the student is at in the Level 2 program and what payments have been made to date.

The Program Completion Policy (pages 45-51) and the Recordings Policy (page 58) apply regardless of the circumstances above.

In no event shall any liability of the Schlote Psychotherapy Professional Corporation, its officers, directors, employees, shareholders, agents, or representatives arising out of any claim related to the Student Agreement and the policies thereunder exceed the aggregate amount paid by the student to the Schlote Psychotherapy Professional Corporation on account of student and/or participation or tuition fees for the EQUUSOMA® program. The Schlote Psychotherapy Professional Corporation shall not be held liable for any losses or damages incurred by the student including lost wages, whether known or unknown, however incurred.

Audiovisual and Social Media Policy

Video Recordings

The current EQUUSOMA® Level 1 Theory Module videos have been pre-recorded with student consent. The breakout experiential exercises during the Level 1 Practice Modules cannot be recorded in Zoom. The Level 1 Bonus Features (live Q&As and Demonstrations) are also recorded and made available to students.

Level 2 Practice Modules are recorded when videography is available. We generally do not film the student practice rounds during Level 2 Practice Modules, unless students are comfortable with it and have provided their consent. Level 2 recordings are largely to support team member professional development. Portions of recordings from either Level and from other sources may eventually be included in our video library (under development).

Video consent is required in order to take part in the EQUUSOMA® training program. This is because we cannot guarantee that a particular student or their name will not show up in a recording in some way (either online or in person), or that a particular student can be edited out of video footage. Students who are not comfortable with the possibility of being recorded may opt out of taking the training at this time.

Level 1 students may reduce the amount of time they are visible in a recording by muting their video and changing their screen name (after we have seen their actual name for attendance purposes). However, to ensure attendance during the breakout rooms (which are not recorded), we require that students unmute their videos and are visible during these portions of the training.

Photography

We do not typically take screen shots during the Level 1 online program. If this should occur (e.g., taking a gallery view photo), students have the option to mute their video so as to not be in the screen shot. Photography does occur at the Level 2 Practice Modules. Students who do not wish to be in photos may opt out of being photographed.

Social Media

We do not tag anyone in photos or videos on social media without prior consent, and the tagging we do usually only pertains to team members. We do not tag students in images or videos, and leave that to the individual student to decide.

Waiver and Release

All students, assistants, faculty, and other supporters present during trainings must sign a waiver and release pertaining to audiovisual and media use related to EQUUSOMA® events.

Recordings Policy

EQUUSOMA® students who joined the program prior to the student eLearning portal being built and going live in January 2024 will have had varying degrees of access to the recordings of the modules that they completed via Zoom. These recordings will cease to be available through Zoom as of December 31, 2023.

2019-2023 Students: Please see the Special Accommodations listed on pages 49-51 regarding access to the current recordings in the new eLearning portal.

Recordings Access

Level 1 Students

- Students who have completed all the training components of Level 1 retain access to the pre-recorded Theory Modules they completed and their recorded Bonus Features **for 1 year** following the end of Level 1 (i.e., access ends the following January 31).
 - E.g., A student who registers for the Level 1 cohort beginning January 2024 and finishes in January 2025 will retain access to their recordings until January 31, 2026.
- Students who cancel partway through Level 1 will retain access to the training components that they had unlocked in the portal at the time of cancellation for **1 year** past the date of cancellation.
- To unlock access to those pre-recorded Theory Modules and their recorded Bonus Features, students can either:
 - Register for the next step in the training program, at which time access to what was completed previously will be reinstated, **or**
 - Pay to access what was completed previously by paying a monthly or yearly subscription.

Level 2 Students

- Students who have completed all the training components of Level 2 retain access to the pre-recorded Theory Modules they completed **for 1 year** following the end of Level 2 in the cohort that they have registered for.
 - E.g., A student who registers for the Level 2 cohort taking place in Australia will retain access to their recordings for one year past the end of the Level 2 Australian cohort.
- To unlock access to those pre-recorded Level 2 Theory Modules, as well as the recordings from Level 1, students can:
 - Register for the next step in the training program (if applicable), at which time access to what was completed previously will be reinstated, **or**
 - Pay to access what was completed previously by paying a monthly or yearly subscription.

The Schlote Psychotherapy Professional Corporation takes all reasonable steps to ensure the safety and security of its data, including recordings of modules. However, the Schlote Psychotherapy Professional Corporation shall not be held liable should such data, including recordings, fail or otherwise become irretrievably lost for reasons beyond its control. The term regarding Force Majeure Event (page 48) applies.

Trademark, IP, Licensing and Representation Policy

Trademark Use

Somatic Experiencing® is a registered trademark of the Foundation for Human Enrichment (administered through Somatic Experiencing® International), in the US, Canada, and other countries. Individuals who are in the process of completing (or who have completed) the EQUUSOMA® training program may not call themselves Somatic Experiencing® Practitioners or claim that they are trained in or offering the Somatic Experiencing® method unless they have done that training as well. The two processes are separate. It is, however, possible to explain that the EQUUSOMA® model itself is a paradigm that is grounded in the Somatic Experiencing® method. SEI has advised that terms like "Equine-Assisted Somatic Experiencing®" constitute trademark infringement and are not permitted. Individuals who are not trained in the EQUUSOMA® program but have taken or completed Somatic Experiencing® training and have the requisite additional scopes of practice could describe their work as "Somatic Experiencing® and equine-assisted psychotherapy" or "Somatic Experiencing® with horses" or "Somatic Experiencing®-based horsemanship", and so on.

EQUUSOMA® is a registered trademark of Sarah Schlote and the Schlote Psychotherapy Professional Corporation in Canada, the United States, the European Union, and Australia, with other countries under way. Individuals who are in the process of completing (or have completed) the Somatic Experiencing® training program may not call themselves EQUUSOMA® Practitioners or claim that they are trained in or offering EQUUSOMA® unless they have done the EQUUSOMA® training as well. The two processes are separate. Individuals who are trained in Somatic Experiencing® and offer equine-related services of various kinds may not call their work EQUUSOMA® unless they have undertaken the EQUUSOMA® training specifically. An individual who has not taken EQUUSOMA® training but has read about the model and tries to incorporate its principles into their work may indicate that they use certain skills and frameworks inspired by EQUUSOMA®, but cannot claim to be "trained" in the method or claim to offer EQUUSOMA® sessions.

Ponyvagal™ is trademark of Sarah Schlote and the Schlote Psychotherapy Professional Corporation that is in the process of being registered in multiple jurisdictions. Other non-registered trademarked expressions include **"restoring regulation, relationship, and resilience™"**, **"it's time to feel felt and get gotten™"**, and **"couples therapy for you and your horse™"**. These trademarks may not be used without written permission from Sarah Schlote and/or the Schlote Psychotherapy Professional Corporation.

Intellectual Property and Copyright

Sarah Schlote and the Schlote Psychotherapy Professional Corporation are the exclusive owners and licensee of all materials created for use in the training, including but not limited to all printed, audio, video, digital, online, and other materials ("Materials"), with some exceptions (see below). These Materials also include all duplicates, reproductions, and derivatives of the Materials, as well as any materials, research, books, articles, and other works of authorship, as well as products and services, created by Sarah Schlote and the Schlote Psychotherapy Professional Corporation. Sarah Schlote and the Schlote Psychotherapy Professional Corporation retain all rights to all intellectual property utilized, developed, or referenced in the training or other events and Materials, including but not limited to the copyrights in the Materials and all associated trademarks. No Materials or any portion thereof are sold or otherwise transferred, and Sarah Schlote and the Schlote Psychotherapy Professional Corporation do not sell, give, grant or transfer any title, ownership right, or interest in or to any of the Materials.

No one will disclose, duplicate, reproduce, publish, or distribute to any third party any intellectual property belonging to Sarah Schlote, the Schlote Psychotherapy Professional Corporation and its agents or representatives without prior written permission, with the exception of the specific circumstances listed in the licensing section below. No one will share any of the aforementioned intellectual property publicly or on the internet (such as a website, social media, or other file sharing service).

Unauthorized recordings (audio, video, or otherwise) and photographs are not permitted during any EQUUSOMA® event. The use of screen recording technology to copy EQUUSOMA®-related videos is prohibited. Sarah Schlote and the Schlote Psychotherapy Professional Corporation will not be liable or responsible for any unauthorized recording or photography of EQUUSOMA® trainings or related events, or use or exploitation thereof. There is a separate audiovisual and media release pertaining to authorized media related to EQUUSOMA® events.

Third Party Materials

The EQUUSOMA® program at times will share materials from third parties. These include but are not limited to specific items that are being used under special licensing permission from Somatic Experiencing® International or other sources, and resources or materials that are publicly available online. The Schlote Psychotherapy Professional Corporation is not responsible for the content of materials produced or held by third parties, and sharing these materials is in no way an endorsement of the third party.

Licensing

EQUUSOMA® trainings are offered under special license and permission from Somatic Experiencing® International (SEI). This approval does not grant EQUUSOMA® students the right to claim they are trained in Somatic Experiencing®.

EQUUSOMA® students and Practitioners, faculty, faculty in training, assistants, and approved providers are granted a revocable license to use EQUUSOMA® methods and materials in the context of their direct service delivery (such as sessions, lessons, group workshops, clinics, private intensives, etc., whether the primary client is the human, the equine, or both), with proper citation, in support of personal goals. For instance, handouts that were developed to be shared with clients (e.g., describing certain concepts, frameworks, etc.) and shared during the EQUUSOMA® program may be used for this purpose.

Completing EQUUSOMA® training does not allow anyone to provide training in EQUUSOMA® to others (it is not a train the trainer program), or to use EQUUSOMA® training materials in developing their own training or professional development program or course without a formal license, as this would constitute both trademark and copyright infringement. A formal faculty mentoring process must be completed to obtain a license to teach EQUUSOMA®.

Individuals may face legal action if they engage in copyright or trademark infringement, whether in regards to the stipulations outlined above, using EQUUSOMA® materials or other proprietary information to create a similar professional development training (that supports a client's professional goals), choosing a name that bears resemblance to the EQUUSOMA® trademark, or other infringements. If someone has created and delivers their own professional training program that is separate from EQUUSOMA®, they will ensure that the distinctions between it and EQUUSOMA® are clear to reduce confusion. Such programs will not be promoted as being affiliated with EQUUSOMA® other than indicating your training in EQUUSOMA® in your bio.

Individuals who wish to provide an introductory presentation about EQUUSOMA® to inform others about the model and how they incorporate it in their work must submit a request to info@equusoma.com along with any intended materials for review to obtain licensing approval at least 1 month prior to the date of the presentation. A licensing fee applies to those wishing to provide such presentations. I acknowledge that the Schlote Psychotherapy Professional Corporation reserves the right to approve or deny any application for a license, and that these licenses are revocable at the sole and unfettered discretion of Sarah Schlote and the Schlote Psychotherapy Professional Corporation.

Representation

Students, Practitioners, assistants, faculty, approved providers, staff, and other representatives agree to appear and act in a professional manner at all times while participating at EQUUSOMA® events and/or when interacting with other EQUUSOMA® students, faculty, staff, assistants, approved providers, and other representatives, both within and outside each event.

The term EQUUSOMA® may be used in marketing in the following approved ways:

Approved	Misleading
<p>Level 1:</p> <ul style="list-style-type: none"> ☑ <i>I am an EQUUSOMA® Level 1 student.</i> <ul style="list-style-type: none"> ▪ Can mention which training components have been completed. ☑ <i>I am an EQUUSOMA® Level 1 graduate.</i> 	<ul style="list-style-type: none"> ☒ <i>I am trained in EQUUSOMA®.</i> <ul style="list-style-type: none"> ▪ Unclear how much training has been completed and at what level. Could be misinterpreted to mean that the person has completed EQUUSOMA® training.
<p>Level 2:</p> <ul style="list-style-type: none"> ☑ <i>I am an EQUUSOMA® Level 2 student.</i> <ul style="list-style-type: none"> ▪ Can mention which training components have been completed. ☑ <i>I am an EQUUSOMA® Level 2 graduate.</i> 	<ul style="list-style-type: none"> ☒ <i>I am an EQUUSOMA® graduate.</i> <ul style="list-style-type: none"> ▪ Unclear which level of training the person has graduated from: Level 1, Level 2, or the entire program.
<p>Entire Program Completed:</p> <ul style="list-style-type: none"> ☑ <i>I am an EQUUSOMA® Practitioner (ESP).</i> 	<ul style="list-style-type: none"> ☒ <i>I am trained in Somatic Experiencing®.</i> <ul style="list-style-type: none"> ▪ Only those who have taken Somatic Experiencing® training may make such a statement (though preferably the level of SE™ training would be specified, for the reasons outlined above).

Individuals involved with the EQUUSOMA® program in any capacity will abide by common professional standards around how they represent or advertise their professional services. This includes being truthful, accurate, and clear in their description of their services and areas of expertise. They will not make deceptive statements about their training, credentials, professional memberships, services, fees, success rates, education, experience, affiliations, publications, media presentations, and other descriptions pertaining to themselves and their practices. They will be particularly careful around misusing neuroscience or pseudoscience information in order to influence potential clients. They will also clearly state their level of EQUUSOMA® training or degree of involvement in the EQUUSOMA® model and their scope of practice.

Only approved faculty are permitted to teach the EQUUSOMA® program. If someone wishes to present about EQUUSOMA® in a public format (to promote their own services or the EQUUSOMA® model), they must be pre-approved as a presenter by Sarah Schlote and the Schlote Psychotherapy Professional Corporation. If receiving payment to offer a brief presentation about EQUUSOMA®, students and Practitioners will be required to inform The Schlote Psychotherapy Professional Corporation, pay a licensing fee, and have their materials reviewed.

Solicitation

During EQUUSOMA® events, no one will advertise or promote trainings, seminars, workshops, newsletters, or any other goods and services for themselves or on behalf of any other individual or entity without prior written permission of The Schlote Psychotherapy Professional Corporation and its agents or representatives. Sharing a business card or professional contact information to facilitate communication and connection with others in the program is appropriate.

Recognition

The Schlote Psychotherapy Professional Corporation and its agents or representatives make no promises or guarantees as to the recognition, regulation, or accreditation of the EQUUSOMA® model, the title “EQUUSOMA® Practitioner”, or any such designation within any jurisdiction in Canada or abroad.

Scope of Practice

EQUUSOMA® program students, Practitioners, faculty, assistants, and approved providers will at all times be fully paid and up-to-date members of a professional association maintaining an industry- standard code of ethics and/or standards of practice, AND/OR will at all times maintain a fully paid and up-to-date professional license/registration with an applicable licensing or regulatory body. If someone is a student within a particular professional scope of practice while also involved in the EQUUSOMA® program, they will ensure that they abide by industry standards pertaining to their status as a student within their intended profession.

If someone’s profession is newer and has yet to create a professional association or regulatory/licensing body (or is offering services that do not fall neatly under one clear scope of practice), they will research relevant ethics and standards that apply to similar professions and abide by these to the best of their ability. If someone does not have a professional scope of practice within which to integrate EQUUSOMA®, they will seek one out and understand that they may not be permitted to begin and/or complete the training and designation process until such a scope of practice has been identified and developed.

EQUUSOMA® students, Practitioners, faculty, assistants, and approved providers are responsible for ensuring that they have adequate professional insurance to cover the inclusion of the EQUUSOMA® model and participation with the EQUUSOMA® program within their scope of practice.

Attending EQUUSOMA® training does not ensure that all methods, principles or techniques taught within the program will be appropriate for inclusion in someone’s professional practice. EQUUSOMA® training will not qualify anyone to be a trauma therapist, Somatic Experiencing® Practitioner, or equine professional. Students, Practitioners, faculty, assistants, and approved providers are responsible for operating within their professional scope of practice and for abiding by provincial/state and federal laws and any applicable legislation.

Testimonials and Anecdotes

Testimonials

Anyone is welcome to provide testimonials about their experience in the training and/or about how the EQUUSOMA® program/model has transformed their work and the lives of the nervous systems they work with. Testimonials may include the person's name, scope of practice, and location, or may be anonymous. The use of testimonials may be regulated by legislation in certain jurisdictions, and any use of testimonials will respect any applicable laws.

Anecdotes

Sharing anecdotes from one's own personal life or professional work may be helpful to support learning and integration for others. Individuals may at times share such examples in the context of the EQUUSOMA® training program, or may be willing to have such anecdotes included in training materials, written publications, social media, or video recordings. While this is a common practice, sharing anecdotes must nonetheless be done with respect for the ethics, standards of practice and regulations associated with one's profession, including norms around confidentiality, disclosure consent, and privacy laws. In the case where no such direction is available, the American Psychological Association offers the following guideline that is useful for anyone considering sharing an anecdote, regardless of the person's scope of practice. The APA's original stipulation has been adapted below for the EQUUSOMA® program:

Use of Confidential Information for Didactic or Other Purposes – EQUUSOMA® students, Practitioners, assistants, faculty members, approved providers, staff, and other agents and representatives do not disclose in their writings, lectures or other public media, confidential, personally identifiable information concerning their human and/or equine clients/patients, students, research participants, or other recipients of their services (regardless of species) that they obtained during the course of their work, unless (1) they take reasonable steps to disguise the individual (human, equine, or other) or organization, (2) the person or organization has consented in writing, or (3) there is legal authorization for doing so.

Additional ethical considerations pertaining to anecdotes have been outlined by Gollyhorn and Handelsman (2016)² and include:

- Not using stories that blame, shame or are unflattering, but rather stories that enhance understanding (or, in the same vein, ensuring identifying information about colleagues or organizations is removed or changed, so as to not defame or slander).
- Ensuring that a story is shared in such a way that others would feel comfortable and respected if they were to be in the room hearing the story and recognized themselves.
- Not sharing stories to exploit for one's own ego or benefit, or to sensationalize.
- Not sharing stories that would change how one would feel towards a human or an equine, and affect the therapeutic alliance, working relationship, or course of treatment/service delivery.
- Exercising caution when sharing trauma-related examples, such as not sharing explicit or unnecessary details of traumatic experiences.

² <https://www.psychologytoday.com/blog/the-ethical-professor/201610/the-ethics-sharing-client-stories>

Additional Policies

Language

Individuals who wish to enroll in EQUUSOMA® offerings must be proficient in the language in which they are being taught, which includes the ability to read, write, understand, and communicate in that language prior to enrollment. Proficiency is essential in order to be able to make sense of the specialized terminology used in the program as well as communicate effectively with others about information that can be subtle and nuanced. If a team member determines that a student's language skills are not adequate, the student may be required to hire an interpreter at their own expense, or be asked to leave the program until skill level is improved.

Currently, EQUUSOMA® is offered in English. Additional languages of instruction may be available in future.

Travel

Everyone is solely responsible for making their own travel arrangements. The Schlote Psychotherapy Professional Corporation and its agents and representatives assume no responsibility for the flights, other forms of transportation, lodging arrangements, or visas required to attend EQUUSOMA® offerings, if applicable. If someone wishes to attend an EQUUSOMA® offering in a foreign country, we recommend that you review your individual travel requirements, country requirements, vaccine requirements, and travel advisories carefully prior to registering for and attending any particular offering.

Children

Theory Modules: On occasion, extenuating circumstances may require a student to attend to the needs of a child while watching Theory Modules. When this occurs, students are responsible for ensuring that the material and discussion topics are appropriate for the child to be exposed to.

Practice Modules: It is not appropriate for children to be present during the Level 1 and 2 Practice Modules. Students must have child care in place during the Practice Modules so that they can grant their full attention to the training and to reduce child and student health risks. Students who miss beyond the allowed amount of time during the Practice Modules as a result of having to focus on child care must make up the time (see Attendance and Make-Up Time Policy, pages 52-56).

Animals

Level 2+ Practice Modules and other in-person offerings are typically held at private venues that are the home of domesticated animals (which may include equines, pets, and other livestock) and wildlife. As such, animals belonging to anyone attending or supporting these offerings are not allowed at these venues, unless they are formally designated as a service animal under applicable legislation and meet legal requirements.

Health

Research and anecdotal evidence indicate that chronic stress and trauma can have an impact on a developing foetus and can trigger or exacerbate complex health symptoms, if left unaddressed. Also, a person's resilience can sometimes be diminished as a result of adversity, serious health issues, or the physical and emotional effort of pregnancy, resulting in greater vulnerability or a reduced capacity to explore the complex topic of trauma without feeling overwhelmed. The opposite may also be true, where attending such a training may result in learning skills that help reduce such impacts and support resilience. If you have significant unresolved trauma, are currently facing a crisis, are pregnant, or have other serious health conditions, we encourage you to discuss the training with a qualified health care provider prior to confirming or postponing your involvement.

Termination of Involvement

The EQUUSOMA® program presumes students have a mature level of interpersonal competency, good communication skills, and sufficient self-regulation skills to manage their own needs during the program.

The Schlote Psychotherapy Professional Corporation and its agents or representatives reserve the right to approve or deny any application to be a student, EQUUSOMA® Practitioner, assistant, approved provider, or faculty member, may revoke an assistant or provider's approval or the ESP designation at any time, and approve or deny the participation of any person at any event, in its sole and unfettered discretion, with or without cause, and in accordance with its policies and/or the law. Any revocation of approval or right to participate in any event does not give rise to any losses or damages at law.

In the event that The Schlote Psychotherapy Professional Corporation and its agents or representatives request that someone discontinue their participation or involvement with the training, they will immediately leave the training and the premises (or virtual platform) where the training is being held. There may be follow-up post-event to debrief what occurred and to discuss next steps.

If a personal session or consultation provider has their approval revoked, they will immediately inform their existing student clients of their change in status and cease signing log forms. All sessions and consultations that were completed prior to the revoking of approval will still count towards the Certificate Track requirements.

Feedback and Disputes Policy

We appreciate hearing how the program has supported you and the humans and equines that you work with. We also appreciate constructive comments and hearing about your concerns so that we can improve our program, policies, and procedures. Hearing about what can be improved helps us to strengthen the program, and hearing about what went well allows us to celebrate what is moving in our intended direction. This also increases clarity of focus and reduces miscommunications or dynamics that might affect the overall experience of the group.

We take the time to consider all feedback received. Even when we cannot implement or take action on the feedback, we still want you to have an opportunity to be and feel heard by our herd. Please note that feedback is more likely to be considered for implementation if it is specific, measurable, actionable, objective, and within our locus of control to change.

We discuss feedback within the team so that we can ensure that we are holding the feedback intentionally in our awareness as we support the group and each of you individually.

While it is possible to submit feedback anonymously via our feedback form, please note that it may be more difficult to take action on anonymous feedback that is vague or missing key information because we have no way to follow up with the individual. We cannot respond to all feedback received, but having a sense of who has responded allows us to hold your experience in our awareness while you are in the program.

Voicing Concerns

Your voice is important to us. The following information is provided so that you know how to address questions or concerns that you might have.

Concerns about Approved Providers

Approved providers of personal sessions of Somatic Experiencing® and of case consultations or assignment consultations have been granted approval via the EQUUSOMA® program and/or Somatic Experiencing® International because they meet specific criteria. However, The Schlote Psychotherapy Professional Corporation and its agents and representatives do not monitor, control, influence, or regulate approved providers, and do not make any representations or warranties about the characteristics or quality of the services a student might receive with any given provider. The Schlote Psychotherapy Professional Corporation and its agents and representatives shall not be held liable or responsible for any acts or omissions by any provider or for any related legal claims. All sessions and consultations with approved providers are undertaken at the student's own risk. If a student has any issues with or feedback about a particular approved provider, the student is encouraged to address that with the provider themselves. If repair or a resolution is not obtained and the student still requires follow up, students may contact the approved provider's licensing board, regulatory body, or professional association (for the provider's scope of practice) to file a complaint.

Students are also welcome to contact us to advise us of any serious matters so that we may investigate. Depending on the nature of the matter, we may issue a warning, initiate a performance improvement process, or revoke a provider's approval status within the EQUUSOMA® program.

Concerns about Training Assistants or Faculty

Training assistants and faculty have been selected as a result of meeting particular criteria, and are at different levels of development based on their own backgrounds and personal and professional development goals. Similarly, shadow assistants and faculty in training are also at various stages of development within their respective tracks.

Students may bring issues pertaining to training assistants or faculty to the attention of a different training assistant, faculty member, or the program liaison for the purposes of determining next steps towards resolution. Such disclosures will be shared with appropriate individuals within the EQUUSOMA® team for resolution. Depending on the nature of the matter, we may issue a warning, initiate a performance improvement process, or revoke an individual's status within the EQUUSOMA® program.

Curriculum Concerns and Incident Reporting

We do our best to be thorough, informed by the literature and research, aligned with evidence-based or promising practices and practice-based evidence, and to exercise ethics and integrity. If there are any concerns or questions related to the material taught in the program, or you wish to debrief something that you either witnessed or experienced directly, please contact us.

Feedback Process

You are welcome to provide feedback via email (liaison@equusoma.com) or regular mail (PO Box 24039 Bullfrog, Guelph, ON, Canada, N1E 6V8). Alternatively, you may voice any concerns via the electronic feedback form that is emailed to participants following various training components.

Depending on the nature of the feedback, complaint, or dispute, our program liaison or a faculty member may set up a phone call or Zoom meeting to allow time to hear more about your experience, explore what unfolded, and to attempt to seek resolution. While it is not possible for us to follow up with every individual who provides feedback, rest assured that all feedback is nonetheless reviewed and considered.

Duty to Investigate

During group or individual experiential learning, students, staff, or faculty may report certain information to the team which gives rise to a duty to investigate. Sometimes students may report information to approved providers within the context of a one-on-one session which gives rise to a duty to investigate. A senior member of the EQUUSOMA® team may investigate the concerns reported to them or which they learn about. If a student is involved with the concern, that student will normally be asked to participate in the investigation. The senior investigating team member will try to keep the investigation and related information private. However, sometimes it may be necessary to share information relating to students, staff, or faculty with team members to complete the investigation fully and competently. The investigating team member will limit this disclosure to the minimum required disclosure to complete the investigation. The student acknowledges and consents to the disclosure of the student's information for investigation and resolution purposes, even if this information was originally revealed during a one-on-one session with a provider.

The Schlote Psychotherapy Professional Corporation and its representatives are committed to respectful and equitable service delivery and employment practices. Every person has a right to equal treatment in the provision of services and facilities, occupation of accommodation, contracts and in employment. The Schlote Psychotherapy Professional Corporation will not tolerate, ignore, or condone discrimination or harassment and is committed to promoting respectful conduct, tolerance and inclusion. All complaints will be investigated and treated confidentially and there shall be no reprisal. Should a student or team member be found to have engaged in discrimination or harassing conduct, the Schlote Psychotherapy Professional Corporation may take any necessary steps to stop such conduct up to and including termination of their Agreement and expulsion from the program.

This Policies Handbook shall be deemed to be part of the Student Agreement, and together form one legally binding document. The policies in both documents are governed by the laws of the Province of Ontario (Canada). Any unresolved dispute arising from this agreement or my relationship with the Schlote Psychotherapy Professional Corporation shall be submitted to binding arbitration in Guelph, Ontario. Any resulting decision may be entered and issued in a court of competent jurisdiction.