

Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	May	2021		30	April	2022

Section A Reference and administration details

Charity name International Society for Equitation Science

Other names charity is known by ISES

Registered charity number (if any) 1176401

Charity's principal address Hartpury University

Hartpury House

Hartpury , GLOUCESTER

Postcode

GL19 3BE

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Jane Williams	JVP President	May 1 – Oct 22, 2021 Oct 22, 2021 – Apr 30, 2022	Voting members
2	Kate Fenner	Treasurer		Voting members
3	Katrina Merkies	Honorary Secretary JVP	May 1 – Oct 22, 2021 Oct 22, 2021 – Apr 30, 2022	Voting members
4	Orla Doherty	President SVP	May 1 – Oct 22, 2021 Oct 22, 2021 – Apr 30, 2022	Voting members
5	Robin Foster	Membership Secretary		Voting members
6	Janne Winther Christensen	SVP-outgoing	May 1 – Oct 22, 2021	Voting members
7	Lorna Cameron	Honorary Secretary	Oct 22, 2021 – Apr 30, 2022	Voting members

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
Andrew McLean	
Nat Waran	
Hayley Randle	
Paul McGreevy	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Association
Trustee selection methods (eg. appointed by, elected by)	Nomination and election

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

- risk register being created

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To advance equitation science* and practice for the public benefit, in particular but not exclusively by:

- encouraging and supporting research into the training of horses to enhance horse welfare and improve the horse-rider relationship and the dissemination of such research to the public;
- applying valid, quantitative scientific methods to create evidence-based measures to inform equestrian practices; and
- raising awareness of equine learning theory and its current application.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

*Equitation science promotes an objective, evidence-based understanding of the welfare of horses during training and competition by applying valid, quantitative scientific methods that can identify what training techniques are ineffective or may result in equine suffering.

1. Being a leading global influencer through communication, dissemination and education of scientific evidence pertaining to Equitation Science
 - a. Website updates
 - b. Social media posts
 - c. Partnerships with key forums, policy groups
 - d. Special member newsletters
 - e. Annual scientific conference
 - f. Presentations to diverse audience groups
2. Supporting research with impact – generate evidence to drive improvements
 - a. Fund student research projects
 - b. Publish best practice guidelines
 - c. Establish support for early career researchers – mentors, funding

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

ISES works with contributions from a number of volunteers both on Council and ex officio on various committees. Council consists of the presidents (junior, senior and honorary presidents), honorary secretary, membership officer, governance officer, veterinary liaison officer, research officer, student representative, practitioner representative, education officer, media team and an ordinary council member. Ex officio volunteers assist with taper gauge sales in different countries throughout the world.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

- Held five regular council meetings (#68-72)
- AGM held in October 2021. Elected new JVP (Katrina Merbies), secretary (Lorna Cameron), practitioner representative (Cath Henshall), media officer (Sally O'Neill)
- Held two trustee meetings (Aug 2021, Nov 2021)
- 17th Annual conference held virtually Oct 20-22, 2021 - Advancing equestrian practice to improve equine quality of life. We offered the conference free to anyone this year as it was virtual.
 - Clever Hans speaker – Mike Mendl
 - 4 keynote speakers
 - 4 plenary speakers
 - 20 research presentations
 - 39 lightning talks
- Translated ISES principles into Czech language
- Removed requirement for outside letters for academic membership applicants. Academic accomplishments should stand on their own along with a brief statement from potential members about why they would like to join.
- One newsletter created and circulated to members. Found this was a lot of work for little return, so reworking approach into podcasts, videos, lay articles to engage audience more. Developing a timeline for releases starting in 2023.
- Made facebook group public to allow more interaction and address EDI policies. Still requires membership to be requested before allowed to join group
- Twitter handle restarted @equitationscien
- facebook reach of almost 80,000 with 2800 page visits
- Instagram reach of over 1300 with 700 profile visits
- metrics from sally
- Operational plan to achieve strategic priorities impacted by the COVID-19 pandemic. We are behind in achieving our goals
- Taper gauges – steady sales (538 during this fiscal year). Stock is dwindling. Taper gauge committee sourcing supplier for new batch
- Review of council and trustee skills – skill matrix and GEM assessment. We have a breadth of skills across council and trustees but there is a need to articulate our own skills better to each other to enable assistance when/where necessary. Review of individual roles underway
- 18th annual conference to be held at Hartpury, UK, August 10-12, 2022. Planning underway

Section E

Financial review

Brief statement of the charity's policy on reserves

We keep a separate business account with a reserve of £5000

Details of any funds materially in deficit

NA

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.



- The principal source of funds is from memberships and taper gauge sales.
- Sponsorship is sourced in relation to the annual conference to offset conference costs
- Given that the world was still mostly in pandemic mode, our conference in 2021 remained virtual and expenditures were minor.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Katrina Merkies	Andrew Neil McLean
Position (eg Secretary, Chair, etc)	President	Trustee
Date	February 25, 2023	



The International Society for Equitation Science

ANNUAL REPORT 2021-2022

ISES President | Jane Williams

Summary of the year

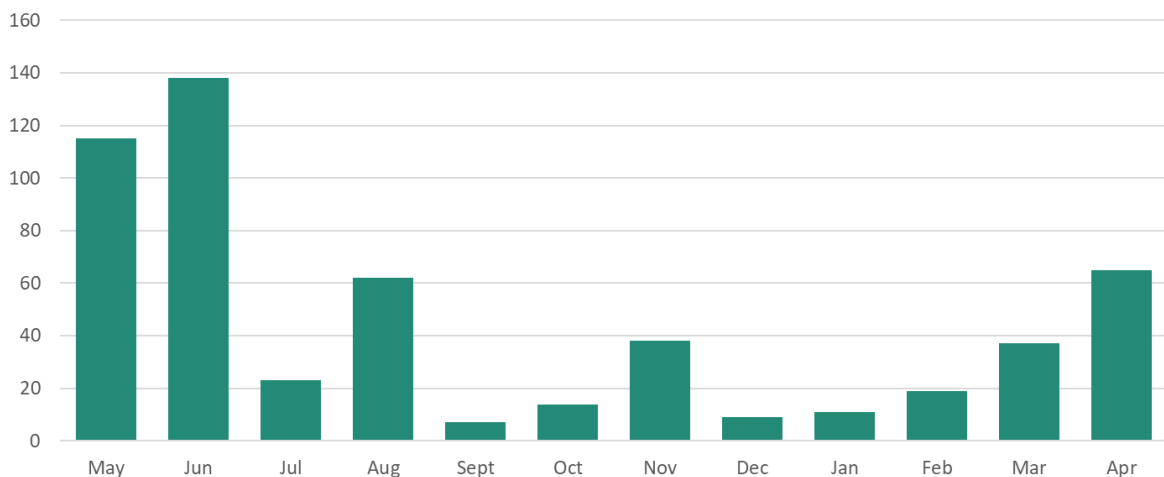
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 - o Clever Hans speaker – Mike Mendl
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 - o 39 lightning talks
- Translated ISES principles into the Czech language
- Removed requirement for outside letters for academic membership applicants. Academic accomplishments should stand on their own, along with a brief statement from potential members about why they would like to join.
- One newsletter was created and circulated to members. Found this was much work for little return, so reworking the approach into podcasts, videos, and lay articles to engage the audience more. Developing a timeline for releases starting in 2023.
- Added an additional public group to FB to allow more interaction and address EDI policies. Membership of ISES is not required for membership in this group.
- Twitter handle restarted @equitationscien
- Improved Facebook and Instagram metrics

- Updated ISES member logos being distributed



Member of
The International Society
For Equitation Science
Until April 2024

- Operational plan to achieve strategic priorities impacted by the COVID-19 pandemic. We are behind in achieving our goals
- Taper gauges – steady sales (538 during this fiscal year). Stock is dwindling. Taper gauge committee sourcing supplier for a new batch



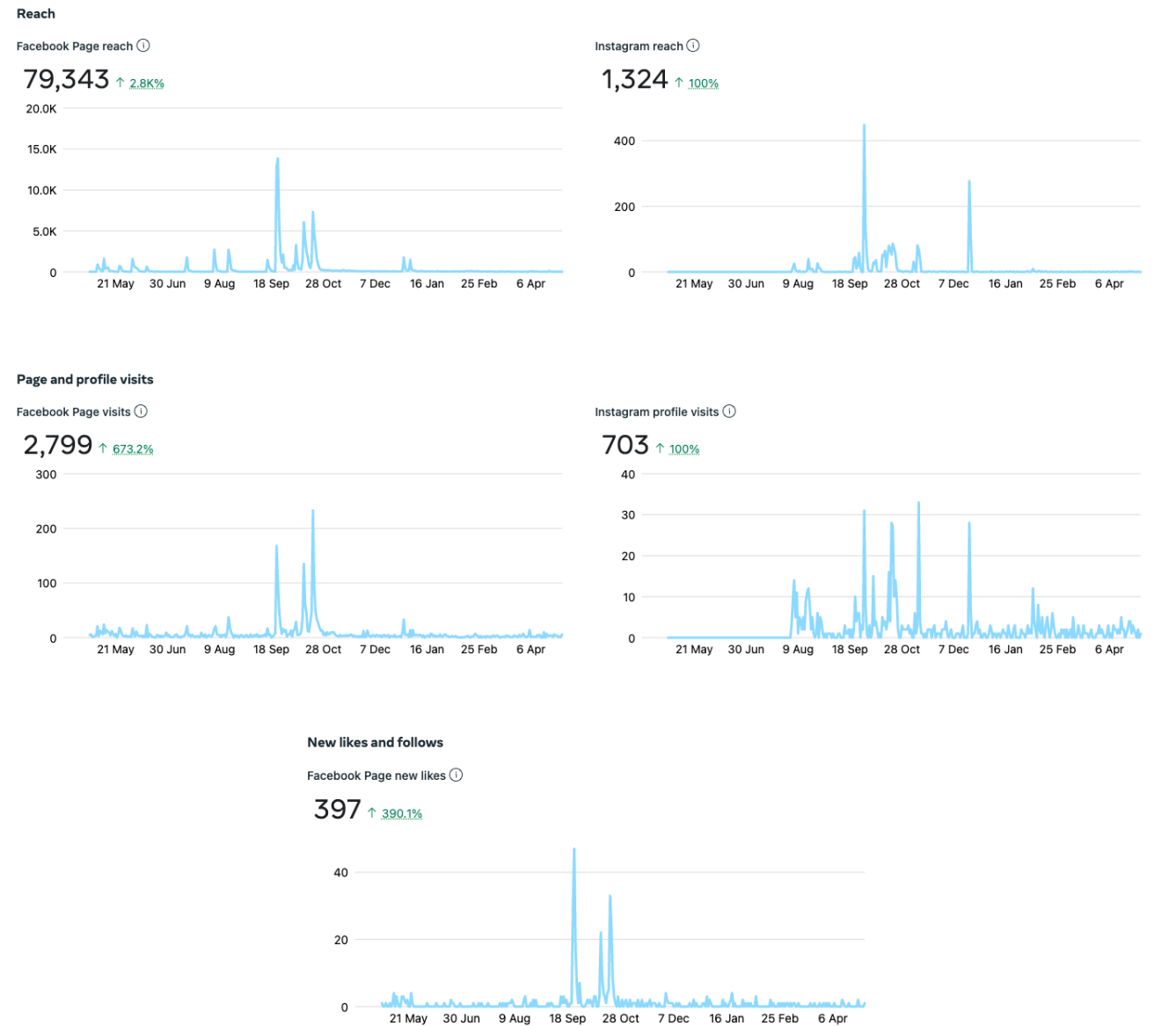
- Review of the council and trustee skills – skill matrix and GEM assessment. We have a breadth of skills across council and trustees, but there is a need to articulate our skills better to each other to enable assistance when/where necessary. Review of individual roles underway
- 18th annual conference to be held at Hartpury, UK, August 10-12, 2022. The conference will have an in-person and virtual option. Planning is underway.

Media

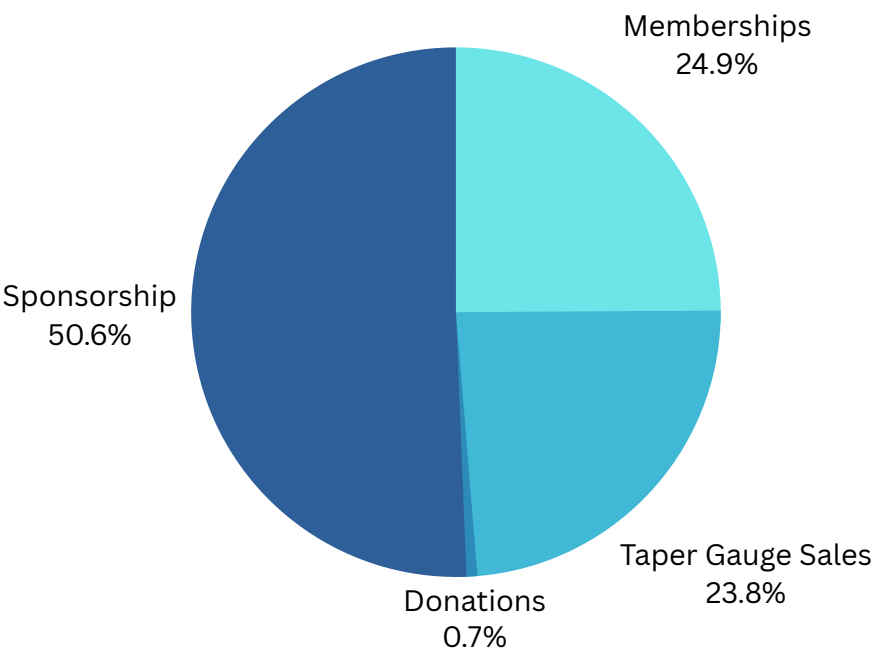
Media activities began the move towards a highly organised approach to output media content. This had to begin with the development of a new website, allowing media to be added easily and effectively. We reorganised the media roles into a team structure, with one point of contact for other council members, leading to a better distribution of requests for activity. The media team decided, with approval from the council, to move away from a long-form newsletter which was proving difficult to clear for publication and needed modernising. A fresh approach relies on newsletters being concise signposts to ISES activities and new website content. With this structure now in place, work has started to gain insight from council members and the broader

membership in developing a strategy for producing media content (podcasts, webinars, videos) for release. The publication of media for the annual conference has been reviewed and will be modernised for the 2022 Hartpury Conference.

Source: Sally O'Neill



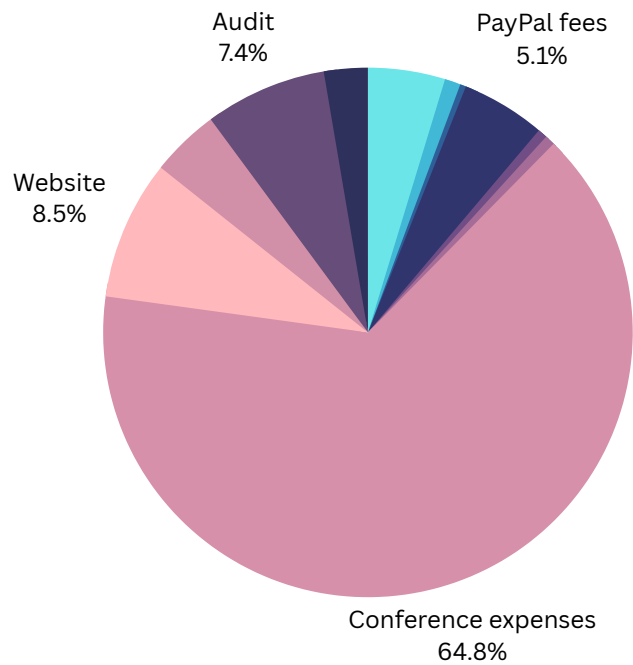
Revenue



Revenue Source	Amount (£)
Memberships	£6,050.00
Taper Gauge Sales	£5,781.00
Donations	£160.00
Sponsorships	£12,300.00
TOTAL	£24,291.00

Expenses

- PayPal Expenses (£1,801.22) and Treasurer's Account Expenses (£14,316.00)



PayPal Expenses	Amount (£)
Currency conversion	£758.45
Refunds	£144.00
Disputes	£12.00
Sundry	£57.60
PayPal fees	£829.17
Treasurer's Account Expenses	
Bank fees	£93.47
Taper gauge postage	£99.54
Conference expenses	£10,444.62

Website	£1,373.08
Newsletter	£655.53
Admin	£18.77
Audit	£1,200.00
Sundry	£430.99
Total	£16,117.22

Net Revenue	£8,173.78
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Net Total Worth	£32,761
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Membership

- Membership numbers have decreased slightly over the year from 256 at the beginning of May 2021 to 238 at the end of April 2022. Decreases were seen mostly in the Practitioner and Student categories.



- The primary activity of membership is to process and review new applications. To improve efficiency and streamline this process, members are now organized on the website by membership level, with new applicants at each level separated until after document review and payment. Previously, all new and renewing membership actions were sent to the membership secretary to be processed and either filed or reviewed.
- Standardized welcome letters have been created for new members at each level except supporter and corporate. For these levels, membership is active immediately upon payment and applications are not reviewed.
- The application process was revised for the new website. A primary change was that documents supporting student, academic, associate, and practitioner applications are now submitted at the time of application. Once they are reviewed and approved, applicants receive a welcome email and payment link. (Previously, applicants paid first and submitted documentation later but became full members at the time of payment. Consequently, several applicants never submitted documentation; the policy was to convert these to supporting membership, which created a practical and potentially legal dilemma).
- Documents submitted by applicants are now posted on the ISES website; previously, applicants submitted them directly to the ISES membership secretary as email attachments. A Membership Committee group is currently being created on the 'Monday' app to improve further the efficiency of the application review process and organizational oversight of the documents. Those board members with access will be able to review and approve membership application documents directly from Monday. This simplified system will replace the current procedure whereby the membership secretary downloads and distributes the documents to committee members by email for them to approve.
- Review documentation requirements for different levels of membership, with a particular focus on practitioner and student levels. If needed, the membership committee will propose revisions.
- Working with other committees such as social media, a goal of membership is to develop strategies to attract new members. Membership starts to wane in September, after the annual conference and picks up again in April. Developing strategies to engage prospective members during this slow period could boost membership.

Spreading Equitation Science

Members	Extension
Orla Doherty	Lecture delivered to equine veterinarians during a three-day equine behavioural medicine course run by the American College of Veterinary Behaviorists on the topic of noseband-related issues and research
Jane Williams	<ul style="list-style-type: none"> • Hosted an afternoon online for Writtle University College Masters students covering ISES, who we are, what we do and our principles • FEI chapters on Equine Quality of Life • Appointed Trustee for Mare and Foal Sanctuary (UK), focus on research and ES
Colleen Brady	<ul style="list-style-type: none"> • Published an article on ISES and an article on instinctive behaviours and learning strategies in the behaviour section of the horse industry handbook. This handbook is used as a high school and college resource. • Presented to Equine Science Club and undergraduate Animal Well-being course at Purdue on Horse Behavior/Learning Theory
Katrina Merkies	<ul style="list-style-type: none"> • Hosted Equine Industry Symposium online with over 500 attendees. One session focused on social license to operate and equestrian sports, featuring speaker Julie Fiedler • Equestrian Canada undertook a pilot noseband measuring project during the 2021 competition season using the ISES noseband taper gauge. Over 500 horses were measured, and over 1500 surveys were completed. Results were analyzed and published
Gemma Pearson	<ul style="list-style-type: none"> • Integrated learning theory into the Edinburgh vet school curriculum • Presented and provided webinars at various vet schools and international conferences • Rewriting the UK Pony Club exam syllabus and Pony Club manual to integrate learning theory and welfare • Awarded best paper presented at BEVA
Kate Fenner, Orla Doherty, Robin Foster and Toni Henderson	Contributed chapters to a veterinary textbook being published to help educate veterinarians on appropriate training methods, learning theory, behavioural assessment and behaviour modification.
Robin Foster	Developing an MSc in Animal Behaviour and Welfare

Lorna Cameron	MSc in Equitation Science being developed at Hartpury College
Camie Heleski (Honorary Fellow)	Guest speaker at World Horse Welfare Conference



CHARITY COMMISSION
FOR ENGLAND AND WALES

International Society for Equitation Science

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Receipts and payments accounts

For the period from	5/1/2021	To	4/30/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
donations	160	-	-	160	967
membership fees	6,050	-	-	6,050	6,003
taper gauge sales	5,781	-	-	5,781	2,008
sponsorships	12,300	-	-	12,300	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	24,291	-	-	24,291	8,978
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	24,291	-	-	24,291	8,978
A3 Payments					
refunds	144	-	-	144	95
bank and paypal fees	935	-	-	935	575
postage fees	100	-	-	100	20
website costs	1,373	-	-	1,373	408
accounting fees	1,200	-	-	1,200	1,200
advertising	656	-	-	656	750
foreign exchange differences	758	-	-	758	574
sundry	489	-	-	489	34
conference expenses	10,445	-	-	10,444.62	-
admin costs	19	-	-	18.77	-
Sub total	16,117	-	-	16,117	3,656
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,117	-	-	16,117	3,656
Net of receipts/(payments)	8,174	-	-	8,174	5,322
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	24,587	-	-	24,587	-
Cash funds this year end	32,761	-	-	32,761	5,322

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	treasurers account	27,513	-	-
	business account (reserve contingency)	5,006	-	-
	Paypal account	242	-	-
	Total cash funds	32,761	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
			-	-
			-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
			Katrina Merkies	22-Feb-23