



Aftercare Funding Review

March 2021

THE
RACING
FOUNDATION

 Horse
Welfare
Board



Foreword

Charlie Liverton, Chair of the Aftercare Funding Review Steering Group, on behalf of the Horse Welfare Board, and CEO of the ROA

The genesis of the Aftercare Funding Review (AFR) was the Horse Welfare Board's (HWB) publication of "A Life Well Lived" (February 2020) and the requirement for a separate review of the Aftercare sector. I am now pleased to share this with you.

The aftercare of horses, like welfare in general, is an emotive topic and from the outset the feedback from the consultation made it clear that the review could not just focus on the funding of the sector but needed to capture wider sentiment, feedback, ideas and commentary from those involved. I hope that this review does both and gives clear recommendations for the future of the sector.

The report has been made possible due to the collaboration of, and contributions from, those who gave their time to the consultation process. The readiness to share financial data and participate in surveys and interviews has enabled the delivery of this report. Though not complete, the data sheds light on the issues facing the sector, most notably highlighting the need for a robust and comprehensive traceability programme. The incomplete understanding of the route taken by every horse bred for racing is a knowledge gap that the industry should look to close.

It has also become clear through this review that there is tremendous work being done every day for horses up and down the country, but the core recommendations need careful and thorough consideration and action. The sector does not have a comprehensive management tool in place and this might damage the future of racing as a whole.

I would like to thank The Racing Foundation for supporting the creation and development of the review and say a personal thank you to the project team, steering group and all those who contributed to the consultation process for their work in producing this complex analysis and recommendations.

I am excited by the opportunity this review presents and look forward to working with you all to see the recommendations progress.

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Executive summary

While this executive summary provides an overview of the process and recommendations, it is not an effective substitute for reading the entire document. It also needs to be emphasised that this review will continue to be a work in progress and evolve.

The Aftercare Funding Review (AFR) was commissioned in June 2020 by the Horse Welfare Board (HWB), arising from "A Life Well Lived" (February 2020), and has been funded by The Racing Foundation. The project team responsible for the writing of the review reports to the Horse Welfare Board via an industry-resourced steering group.

The process followed, in creating the report, is detailed fully in the document but contains three core elements:

1. Desk research to analyse the current funding structures and movement of horses, and to collate and present available data.
2. Quantitative research derived from a survey sent to those working in the aftercare sector.
3. Qualitative research from 1-2-1 interviews from a broad spectrum of racing and non-racing organisations.

The result of which, combined with the complex and emotive nature of aftercare, has meant it has been impossible to keep this report solely focused on the financial aspect of aftercare and the report therefore makes recommendations that are wider reaching.

The process and report have also attempted to identify and, where possible, address the data gaps

which exist. These gaps have formed a barrier to both the delivery of the project and the delivery of a cohesive aftercare sector. The extent of this should not be underplayed, nor the importance of addressing this, both within the racing industry and beyond. The report highlights this issue, which contributes to a lack of visibility of the horse at key points in its lifetime, whilst recognising the ongoing initiatives aimed at addressing the issue.

The data gap also contributes to difficulty in quantifying the funding gap which exists in supporting horses, especially in their first transition from racing. The report seeks to understand the gap between the financial contribution provided by "racing" and the actual costs of retraining horses within the aftercare sector. Without clear sight of the horses leaving racing and their first destination post racing, there has been difficulty in understanding this, and the review has had to work with data provided via the aftercare sector, rather than being driven by data sourced from racing.

Recommendations

These can be divided up into seven categories but deal with *any horse bred for racing* and allow the industry to provide for an appropriate transition from racing and to effect welfare for the most vulnerable as necessary throughout their lives. This would then allow the management of all horses bred for racing, allows traceability throughout the horse's life and delivers robust reporting capabilities.

1. Funding

- The development of an agreed funding structure for all horses, aided by an assessment process.
- Introduction of a “pension” scheme formally supported by a broader set of stakeholders than is currently the case.
- A comprehensive database of approved organisations which could be eligible to receive industry funding via a transparent, accountable framework.
- Effective delivery of existing funds, whilst leveraging opportunities for additional financial support.

2. Focus and integration

- Consideration should be given to the boundaries of aftercare and a definition of the scope of future responsibilities should be a priority.
- A focused and independent organisation, supported by the industry and fully integrated within, and accountable to, the HWB and its strategy, is recommended. It would specifically manage the welfare of the aftercare sector and action the findings of this report.
- These organisational responsibilities would include:
 - Strategic oversight of the sector.
 - Managing and distributing funding.
 - Supporting the delivery organisations within the sector.
 - Developing a culture of accountability.
 - Data monitoring and compliance.
 - Creating a united, inclusive and transparent structure.
 - Effective integration with the racing industry.

- Development of a communications and promotion strategy.

- Consideration given to the provision by the racing industry of services currently offered by charitable centres.
- The promotion of welfare within the sector needs to be broadened to incorporate not just the retrained racehorses, but also those horses rehomed to demonstrate and build a full and rounded picture.

3. Traceability and data

- Reiteration of the findings from “A Life Well Lived” that data and lifetime traceability are core to the future of a sustainable racing industry.
- Continue to focus on the “first transition” resulting in the delivery of a comprehensive aftercare database and a strategic approach to data collection, the use of this data, whilst monitoring traceability beyond retirement from racing.

4. Accreditation

- The development of an enhanced accreditation scheme so that organisations receive a “quality mark” that is aligned with the agreed industry protocols and is an aid to define credibility, which would build on existing schemes.

5. Community

- Create a community for all participants, including owners retiring their horses, rehoming and retraining centres and non-racing owners allowing the development of greater communication tools, support and a “one-stop shop” for information.





- This will bring benefit to racehorse trainers, breeders, charities and commercial centres providing non-financial support.

6. Education

- Continue and build on the good work that is already present in highlighting and promoting the thoroughbred post racing.
- Focus on ongoing education regarding industry responsibilities to the horse beyond racing.
- Encouragement of post-racing engagement to broaden education opportunities.

7. Communication

- A dedicated communication programme. This would only be possible with clear data and progress in the management of the sector.

These categories are not mutually exclusive within the aftercare sector, nor the overall welfare strategy and must be considered alongside the other initiatives highlighted by "A Life Well Lived".

Project details

Scope of work

- Analysis of racing's funding model for welfare, with a focus on the aftercare sector to ensure appropriate sustainability of the rehoming sector, developing new funding models and subsidies as required.
- In light of feedback gained throughout the extensive consultation phase of the project, the review and recommendations extend beyond the funding structure to provide a broader strategic review.
- The Aftercare Funding Review was commissioned in June 2020 by the Horse Welfare Board, arising from "A Life Well Lived" (February 2020), and funded by the Racing Foundation. The following is taken from that report (Recommendation C: Reviews of current policies and practices, Item 11):
 - Welfare financing review: The industry to conduct an analysis of racing's funding model for welfare, with a particular focus on the aftercare

sector to ensure appropriate sustainability of the rehoming sector, developing new funding models and subsidies as required, and on opportunities in relation to research and development. This work will be scoped and commissioned appropriately by the Horse Welfare Board.

Project Background

- The publication of "A Life Well Lived" and the inclusion of this project was welcomed by administrators, funders and many of the charitable centres themselves with interests in this area. Current issues include a lack of clarity on objectives, a lack of clarity on responsibility and accountability and a lack of transparency of costs and funding.
- There has been a focus on the question of aftercare by the racing industry since 1995. Whilst significant progress has been made in key areas, themes identified in papers by

the Working Group Investigating the Welfare of Retired Racehorses (1996) remain, including:

- Extent of the problem
- Identification
- Responsibility
- Sales
- Rehabilitation Centres
- Finances

Outline methodology

- Establishment of cross-industry steering group
- Consultation - identify individuals for initial consultation phase, including:
 - The Racing Foundation
 - Rehoming charities
 - Retraining centres
 - Equine welfare organisations
 - International jurisdictions
 - Industry stakeholders
 - Retraining of Racehorses (RoR)
- Understanding of current structure/organisations
- Understand scope for existing structure to support welfare picture moving forwards
- Interrogate current financial model supporting welfare piece
- Survey of Charitable and Commercial Rehomers and Retrainers
- Collation and analysis of data

Throughout the process the project team experienced support, openness and assistance from the vast majority of stakeholders.

Project accountability

The project team reports to a cross-industry steering group (terms of reference in Appendix 1), which included The Racing Foundation as the funder, to provide an appropriate governance structure.

Steering Group

Charlie Liverton (Chair)

Chief Executive Officer, Racehorse Owners Association
Member, Horse Welfare Board

Nicholas Alexander

Licensed Racehorse Trainer

Charles Barnett

Board Member, Racecourse Association
Trustee, Retraining of Racehorses

Yvette Dixon

Board Member, Racehorse Owners Association

Juliet Frost

Financial Controller,
Thoroughbred Breeders' Association

Rob Hezel

Chief Executive Officer, The Racing Foundation

Andrew Tulloch

Director of Operations and Events, Bolesworth Estate

In turn the Project Team also reports to the **Horse Welfare Board**.





Current options for rehoming and retraining

Outstanding work is undertaken by organisations and individuals in this space but this is frequently on an informal and unstructured basis. There is a lack of understanding of the scale of the work being undertaken, and the destination of horses on leaving racing, or for those horses which do not make it into a training yard. There is also confusion around the funding, information and support which is available.

Retraining of Racehorses (RoR – the recognised industry charity) is charged with promoting the versatility and adaptability of thoroughbreds which have been in training. A market and interest in retrained racehorses has been established via this effective promotional route, with a nationwide network of competition. This is a success story for British racing and the consultation process shared a lot of praise for the work done in this area.

The charity also protects horse welfare through a nationwide 'safety net' that is available to assist any former racehorse considered 'vulnerable' via a network of accredited centres. This is known as the VHS (Vulnerable Horse Scheme), and further support is offered via the ERT (Emergency Relief of Thoroughbreds).

RoR is funded via a blend of levies made on some industry stakeholders, additional donations and investment income. There is, however, a lack of awareness of the current funding model, and the operation and purpose of RoR. The charity does not directly retrain horses.

Outside their racing career, thoroughbreds which are bred for the purpose of racing are cared for, retrained or rehomed by a mix of charitable and commercial organisations, and private individuals.

Rehoming charities

- Several independent charities, with a broad geographical spread rehome and retrain ex-racehorses from a variety of sources, including horses direct from racing as well as horses falling into the Vulnerable Horse Scheme.
- Owners contribute a (typically one-off) fee to a rehoming charity to support the initial phase of retraining ahead of rehoming, typically on a loan basis.
- To benefit from additional funding opportunities, rehoming charities have diversified to utilise retired racehorses to support educational or therapy programmes.

Commercial Retrainers

- Depending on whether the horse has been in training, breeders, owners and trainers work to find a home for a retiring horse via an informal network of private retrainers. These retrainers often operate a “mixed” yard, and do not work exclusively with retired racehorses. The funding for this option varies, and is dependent upon the attractiveness of the horse for a secondary career.
- Trainers report receiving emails from retrainers, usually offering a low level of financial compensation for “sound” retiring racehorses.
- Commercial centres exist in parallel with the charitable rehoming centres, with many of them undertaking similar functions.
- Survey respondents and consultees report that they receive little support from racing, and do not identify themselves as part of the racing industry. If accredited by RoR they may receive horses under the VHS, but without this they receive no industry funding.
- There does not appear to be a consolidated database of retraining or rehoming centres.

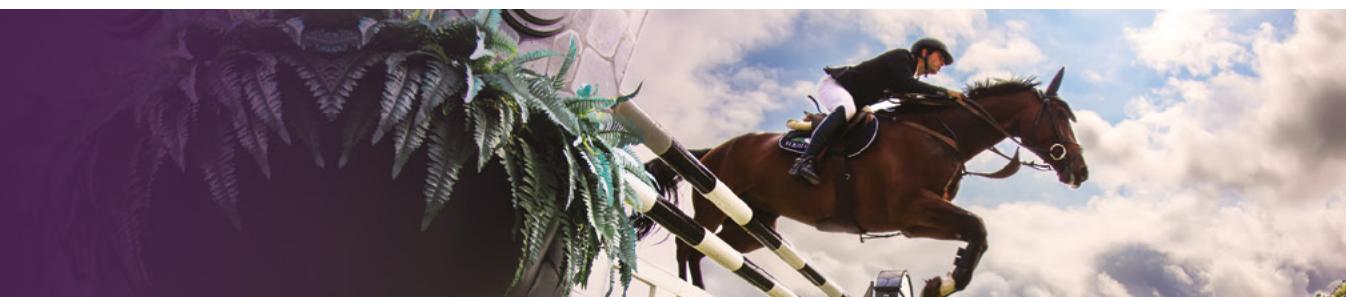
Trainers

- Several trainers run retraining operations in parallel with their racing yards, as well as others running proactive social media accounts promoting their horses. Prospective new homes and owners are “vetted” and relationships maintained with these owners on an ongoing basis.
- Other trainers have well established relationships with retrainers, and individuals specialising in other equestrian disciplines (e.g. polo yards) with their horses following a set path.

Most horses are retrained and rehomed without incident, however robust data to support this assumption remains a risk, and a key recommendation arising from this report is to consolidate and improve the data available. There is an understanding of the responsibility to the retraining of the horse, but the knowledge of and support around this and the costs of retraining could be improved and enhanced.

The Equine Welfare Industry Study, undertaken by Hall & Partners on behalf of the Horse Welfare Board, found that industry participants were more concerned about the welfare of horses before, and particularly after racing, than during their racing careers.

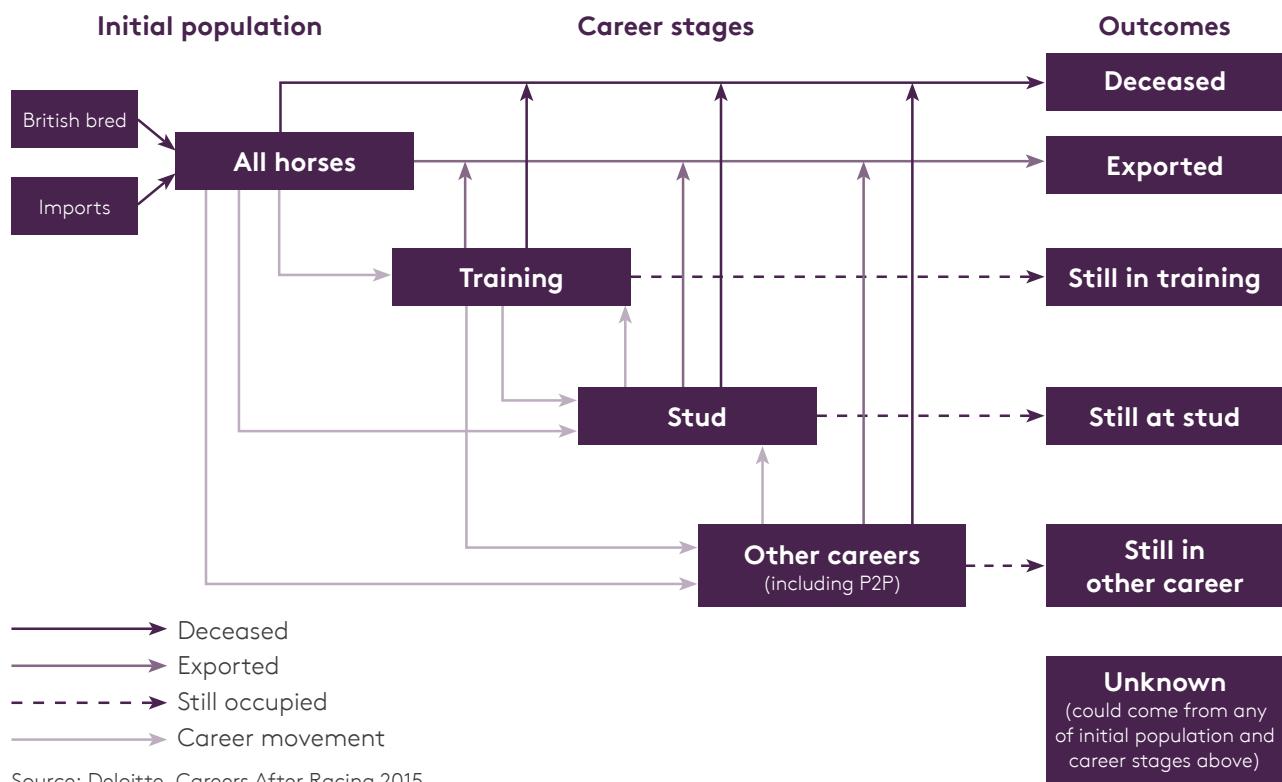
No one individual organisation has “ownership” of the full landscape, which leads to fragmentation and lack of coordination across the sector, as well as a lack of community and support.





Career movements

The typical movements of a horse throughout its career are shown below:



Source: Deloitte, Careers After Racing 2015

The development of the Racehorse Relief Fund (RRF) provides a framework for provision of additional support and monitoring of horses as they leave training.

Whilst horses which enter training are subsequently monitored by Weatherbys throughout their racing career, there is a lack of visibility of those which do not make it into training. Re-homers report that 31 horses which had not entered licensed training were

re-trained throughout 2019 (Source: Aftercare Survey, Aug 2020), highlighting that continued effort is needed to close the knowledge gap in this area.

This is being addressed via a range of initiatives, such as the introduction of 30-day foal notifications and the introduction of digital passports for the 2021 foal crop. Continued improvement of the traceability of all horses bred for racing is highlighted as a key priority for the racing industry within the Horse Welfare Board's strategy.

Process and current data

Currently trainers notify Weatherbys of the next steps for horses leaving training. Since February 2020 amendments to the Racing Administration system have seen improvements to the data available in relation to horses leaving training.

Trainers and owners can give notification of changes in the horse's status and are prompted to give the details of what the horse is going to do and the location it will be going to. Whilst notification of change of ownership is a legal obligation, this is frequently not observed. This presents problems with the traceability of the horse, and the opportunities to engage with "new" owners and support them through their ownership experience.

Prior to February 2020, the following status could be provided for horses on leaving training:

Maintain Status/Location

- At grass
- Companion
- Hack
- Injured / sick
- Pre-training
- Racing abroad
- Resting
- Retired
- Retired - breeding

Remove from Care or Control

- Dead
- Exported
- Injured / sick
- Not advised
- Retired
- Retired - breeding

- Sold privately / given away
- Sport horse (i.e. eventing / polo)
- For recreation (i.e. hacking)
- To point-to-point
- RoR
- Other
- Sold at public auction / claimed
- To another trainer
- Transferred to owner

Post February 2020 the following categories are available:

Temporarily Out of Training

- Injured
- Resting
- Pre-training

Out of my Care or Control/Retired

- Exported
- Notification of death
- Permanently retired
- Point-to-point
- Sold at auction
- To another trainer
- Transferred to owner
- Not advised

Life After Racing

(if permanently retired selected)

- Breeding
- Leisure horse
- Yard Hack
- Companion (unridden)
- Other





Horses leaving training

The total number of horses leaving training for 2018 – 2020 are:

- 2018 = 12,945 horses
- 2019 = 12,740 horses
- 2020 = 10,457 horses (as of 7th November)

This includes horses which are:

- At grass, and
- Resting

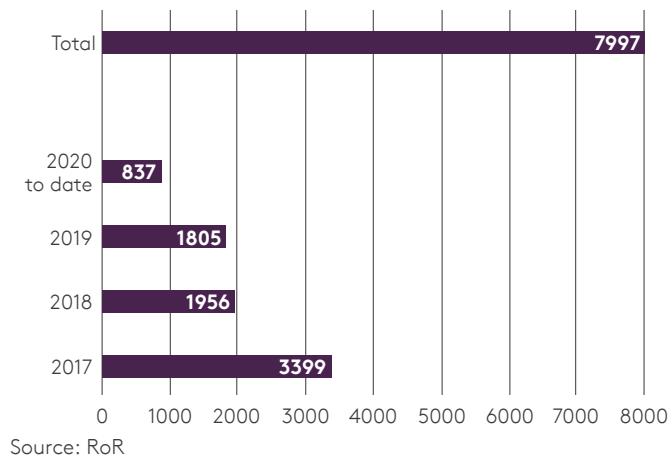
And it should be assumed that these horses are not leaving training permanently and are likely to return.

However, there is considerable scope to drive greater visibility of the horse and its new ownership and opportunities for engagement. Whilst recent improvements encourage the provision of additional data, gaps continue to exist, and compliance is not yet routinely monitored. Sustained focus on encouraging and promoting the provision of this data, and steps to ensure compliance with this requirement should be an industry priority. Continued development of the data fields provided, to encourage provision of email addresses etc., allowing scope for enhanced communications with “new” owners and driving registration with RoR, is also desirable.

RoR registration

As of 12th August 2020, RoR had 7,997 horses actively enjoying a second career and registered on their database. This enables engagement and communication with these horses’ owners and ensures that contact is maintained but represents a small percentage of the horses leaving training.

RoR Registered Horses – 12 August 2020



Current funding structure

The funding for aftercare is difficult to decipher because of the absence of data (as highlighted previously) and the lack of a consolidated view of the sector with no formal structure to support or report on the rehoming or retraining of horses as they enter aftercare.

This section attempts to understand if there is a financial gap in the funding of the aftercare sector, with a focus on charities in the sector, and if so, the size of that gap. The data utilised includes:

- RoR accounts
- Charitable accounts (where possible)
- Aftercare survey results (August 2020)

55% of horses in the care of charitable centres are older than 10 years

Average age of horses

	1-3 years	4-10 years	10+ years
Charities	2%	43%	55%
Commercial	27%	44%	29%

Source: Aftercare Survey Aug 2020

The age profile of these horses means that they may be considered less attractive to loan/sell, and that a longer time may be required for retraining leading to higher costs.

Approximately 48% of horses currently within charitable retraining/rehomming centres have come directly from racing as their first transition (100 horses identified in survey results).

Of the horses that are in your yard currently, how many of them came to you from the following?

	Total direct from racing	RoR VHS	"Non-racing" owners	Other	Total
Racehorse Relief	3	7	8	0	18
Moorcroft Equine Rehabilitation Centre	10	8	4	0	22
New Beginnings	16	12	2	0	30
The Racehorse Sanctuary	27	0	5	1	33
Greatwood	13	9	0	10	32
BTRC	11	0	26	0	37
HEROS	20	7	5	4	36
Number of horses	100	43	50	15	208
Percentage	48%	21%	24%	7%	

Source: Aftercare Survey Aug 2020

Note: BTRC provides support to vulnerable horses via direct industry contributions and currently has 26 vulnerable horses in their care which required charitable assistance on welfare grounds.





Average length of stay

	Months	Total average cost per horse*
Charities	13	£10,530
Commercial	3	£2,430

*applying RoR retraining figure of £27 @ 30 days per month

Source: Aftercare Survey Aug 2020

Throughout the consultation process rehomers reported that owner contributions towards retraining costs are typically £1,000 – £2,000 per horse.

Utilising the average length of stay for these horses, and the associated cost, the total cost for these 100 horses to be retrained is £1,053,000.

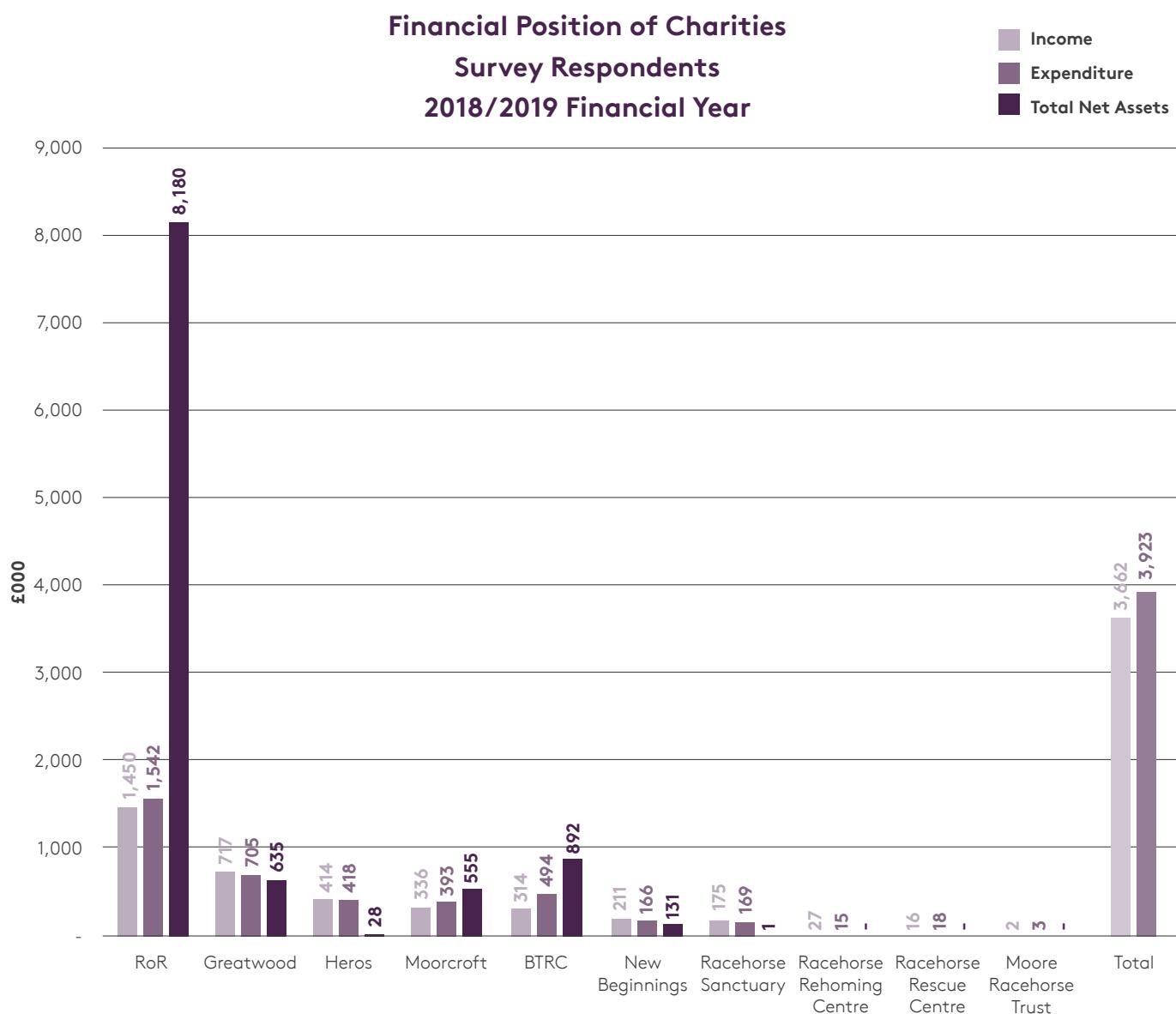
As set out elsewhere in this review, whilst the Vulnerable Horse Scheme supports those horses identified as "Vulnerable", there is no formal funding structure for horses as they directly exit racing. The funding of this first transition from racing and retraining is supported on an informal, voluntary basis, largely by owners on a horse-by-horse basis. Assuming that this contribution amounts to £200,000 (utilising the top of the range of £2,000 per horse), this relates to a shortfall of £853,000 based on the existing charitable model.

The Aftercare Survey identified a further 89 horses as being turned away by charities due to lack of capacity/funds/suitability, indicating a further funding gap. It is recognised that clearly this does not represent the entire population of horses as there is not full visibility of the numbers due to the traceability gaps highlighted, and the lack of engagement and community with the sector.

There should also be recognition that commercial centres are largely self-financing, with the exception of those in receipt of funding under the VHS scheme.

There is a significant disparity in the operating costs of rehoming centres, which reflects the variety of other functions eg education and therapy undertaken by different centres as they diversify in order to qualify for additional funding.

The chart below illustrates the financial position of charities directly involved in the sector and the scale of the charities including net assets (restricted and unrestricted assets included).



Source: Charity Commission for England and Wales 2018/2019 Accounts





The chart illustrates the “micro” business nature of some of the charitable centres, and the dispersed nature of the sector.

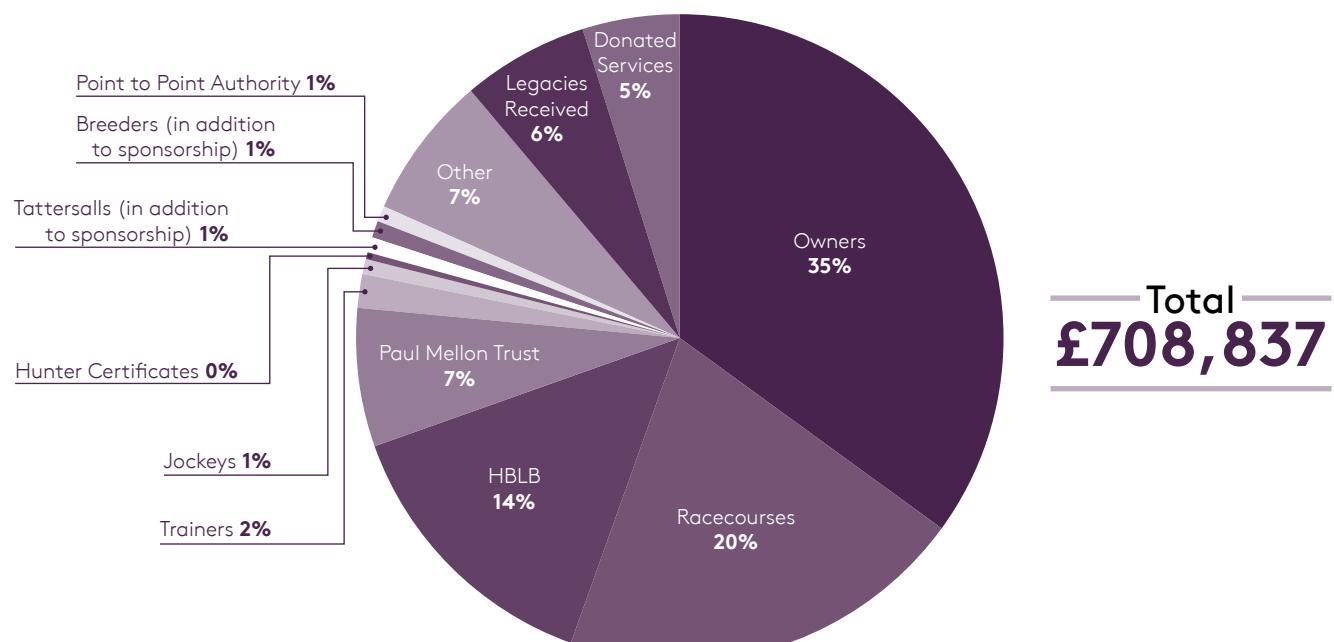
Charities are bridging this funding gap outlined above via a variety of sources (illustrated below).

	Income	RoR Grants	Racing Foundation	Highclere Sponsorship	Elite Racing Club Sponsorship	Newbury Raceday	Various Grants	Other	Accounts as at
Greatwood	£717,000	£53,500	£10,000	£8,500	£14,000	£53,390	£56,284	£521,326	31/08/2019
				Incoming Horses	Legacies				
Heros	£414,000	£108,974	£112,436	£28,900	£36,187			£127,503	31/03/2019
				Plumpton Raceday	Landmark Quiz Night	Centre Events			
Moorcroft	£336,000	£40,000		£88,277	£8,806	£84,372		£114,545	30/06/2019

Source: Charity Commission for England and Wales 2018/2019 Accounts

Industry support

RoR received the following industry funding in 2019:



Source: Charity Commission of England and Wales

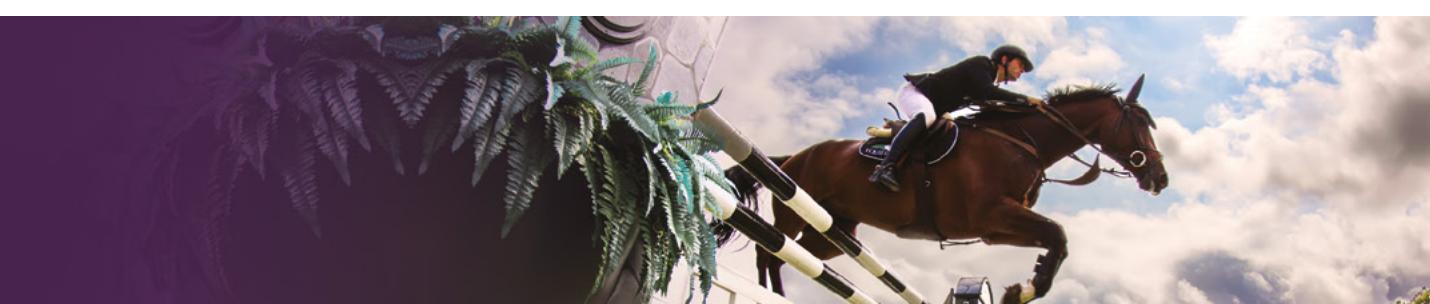
RoR Industry Funding	2019	How contributed?
Owners	£248,486	£1.25 per entry
Racecourses	£145,000	£100 per fixture
HBLB	£100,000	Annual discretionary contribution
Paul Mellon Trust	£49,113	
Trainers	£11,320	£20 per licence (variable – basic up to 25 horses in training: £335.25) (50% supports NTF Retrained Racehorse Eventing Championship)
Jockeys	£5,670	£10 per licence (£201.08)
Hunter Certificates	£2,079	£1 per certificate
Tattersalls (in addition to sponsorship)	£5,000	No formal structure
Point to Point Authority	£3,340	
Breeders (in addition to sponsorship)	£9,621	£12.50 voluntary contribution paid by breeders at the point of registration for foals in Great Britain with the Weatherbys General Stud Book. Breeders can elect to contribute to either the TBA Veterinary Research Fund or the Retraining of Racehorses or both. Both options are set at £12.50 each. This contribution amounts to contributions in relation to 804 foals out of the total 2018 Foal Registrations of 4,674.
Other	£50,382	
Legacies Received	£44,702	
Donated Services	£34,124	BHA provide admin/accounting support
Total	£708,837	

Source: Charity Commission for England and Wales 2019 Accounts

This table highlights the disparity between the size of the contributions made by industry stakeholders and the structure of these contributions. Some of these are made via compulsory levies, whilst others are through voluntary contributions. The lack of a common structure adds to the sense of inequality in this financial model, and a lack of knowledge

and understanding of this funding structure was a common theme throughout the consultation phase and points to a need for shared responsibility across the industry.

This funding does not support the initial transition from racing into the aftercare sector.





Other

Other income of £741,207 is derived from a variety of sources including: fundraising grants and sponsorship, registration and clinic income and investment income.

The expenditure by the charity (both in directly attributable and support costs) is as follows:

Expenditure	2019
Cost of generating voluntary income	£86,857
Investment management fees	£32,319
Promotion of ex-racehorses	£815,027
Charitable grants to centres	£521,552
Governance costs	£86,365
Total	£1,542,120

Source: RoR 2019 Accounts

Vulnerable Horse Scheme (VHS) and Emergency Relief for Thoroughbreds (ERT)

During the consultation phase, of those respondents that were aware of the funding structure, many were not aware of how the funds are used, and the split in this industry funding between promotion and support of horses via the VHS.

Following the Independent Strategic Review of RoR (November 2014), the funding support of charities in the sector was revised. Prior to this, four charities: Heros, Moorcroft, Greatwood and BTBC received financial support from RoR via an annual grant, with explicit support from racing for these core charities, allowing strategic and business planning.

Subsequently donations have been largely made on a "per horse" allocation under the "Vulnerable Horse Scheme", which whilst providing funding support to a wider number of organisations (both charitable and non-charitable) is provided on an ad hoc basis and removes the structure and strategic support previously in place. The RoR works with a network of centres, which receive accreditation from the RoR Head of Welfare (although greater clarification and enhancement of the accreditation and criteria is recommended).

"The RoR "Vulnerable Horse Scheme" is open to horses that have either raced or have been in training in Great Britain.

'Vulnerable horses' have typically changed ownership several times since retirement from racing and in common with problems shared across the equestrian world, the horses are usually victims of a lack of resource on the part of the owner, either in terms of the time and commitment needed to care for a horse or the cost of keeping a horse. Horses enter the scheme with the consent of the owners, who often raise the issue themselves either with RoR or via one of the accredited rehoming centres and charities that RoR works with. The horses are placed with one of RoR's accredited rehoming centres and cared for and retrained with a view to securing them a suitable new long-term home. Approximately 100 horses are assisted by the scheme annually."

RoR also supports a small number of serious welfare cases a year via the Emergency Relief for Thoroughbred funding. Funding is provided where horses require immediate veterinary attention and support.

2018/2019 RoR Grants Payable	2019 No.	2018 No.	2019 £	2018 £
Rehomers/Retrainers	129	120	393,214	473,105
3rd party awards in respect of emergency relief, vet fees and transport	38	19	19,313	13,410
Total	167	139	412,527	487,015
Average size of grant			2,470	3,500

Source: RoR 2019 Accounts

The Accounts report that all grants paid in 2019 were awarded on the basis of RoR's vulnerability criteria. A grant of £40,000 was paid to The British Thoroughbred Retraining Centre following year-end. This illustrates the distribution of RoR funds to a wide range of organisations.

Additional grant funding

Additional funding support is generously provided to the sector by third party grant funders, including the Racing Foundation and The Sir Peter O'Sullevan Charitable Trust. Applications are made by charities (including RoR) on an ad hoc basis, with no overarching strategic framework to support these applications, or to guide funders in relation to the achievement of sector initiatives.

This is cited as a barrier to providing funding support for the sector, and the support for the sector forms a disproportionately small percentage of the overall funding grants made.

One charitable trust reports that of the £6.1m it has awarded since 2016 in respect of 154 applications across all sectors, just £901,000 has been awarded to the aftercare sector in relation to 17 applications (excluding applications made in respect of education/parades).

Another charity reports that since 2013, £811,000 has been awarded in grants to the aftercare sector (excluding education projects). This excludes support provided as a result of the impact of Covid-19. This represents just 6% of the total grant funding awarded.

There is no structured support or guidance provided to charities with regards to funding applications, for which there could be scope. The same applies to grant funding organisations with an interest in the sector.

The survey results illustrated that additional third-party funders support the sector, and the relevant charity accounts show the following:

	Grants payable	Total payable	% of Total
Hilary Tangye Trust (Moorcroft)	£3,000	£45,000	6.67%
Anne Duchess of Westminster's Charity (Greatwood)	£5,000	£236,350	2.12%

Source: Charity Commission for England and Wales 2018/2019 Accounts





Additional funders are identified in charity accounts including the Fred and Marjorie Sainsbury Charitable Trust, The Woodcote Trust, Tesco 'Bags of Help', the Greenham Trust.

Whilst grants are typically divided into category by funding bodies, the range of organisations operating in this space and supporting racing on a piecemeal basis highlights the opportunities available with the development of a strategic operational framework for the sector.

Commercial centres

Whilst several commercial centres are "accredited RoR centres" and receive funding under the VHS as set out above, currently the majority are self-funded, or via informal owner contributions.

Summary

We do not have full visibility of the number of horses accommodated by rehoming centres, whether charitable or commercial as there is not a consolidated database identifying these horses. However, the survey results indicate that horses are being turned away due to lack of funding and capacity, as well as unsuitability.

Our knowledge of those horses of which we do have visibility points towards a funding gap relating to those horses making their first transition from racing, which is currently being covered by charities. A decision should be made whether racing should take responsibility for supporting the funding of this gap.

Recommendations

The recommendations fall into seven areas:

1. Funding

"There is a funding structure, but not at the level that is required, it needs collective industry funding and to be properly run"

- Industry stakeholder

"Each horse to have a pension plan, some won't fall into it and then the pension pot goes towards the common good"

- Welfare organisation

"Create opportunity and avoid charity"

- Racehorse owner/breeder

Currently the process for funding is not currently clearly defined or understood with a worst-case scenario of charities pitting against each other for support. A horse's aftercare funding is often thought of at the end of its racing career by which time the benefit from his or her career is missed. There is a lack of clarity surrounding the current industry funding, the destination and expenditure of these funds, and the costs of retraining a horse.

There is a clear desire for a new strategy to recommend the correct direction for a future funding model, but the research suggests the need for a

stakeholder “pension” scheme to ensure there is a provision for horses, with all of those benefiting from the horse contributing to the costs of aftercare on a fair and equitable basis. This would focus on the collection of contributions prior to and during the horse’s racing career, rather than on its exit from racing (at whatever stage). This should not replace the current significant efforts made, largely by owners and trainers, to rehome and retrain individual horses, but should drive the development of a pooled resource to underpin and support additional provision.

The funding of this scheme, it is suggested, is covered by a broader number of stakeholders than is currently the case. Consideration of additional mechanisms should be given to promote the overall responsibility of the racing industry to the aftercare sector.

The funding mechanisms and introduction of formal and structured contributions by additional industry stakeholders should be more effectively communicated both internally and externally. This could also support more structured and strategic support for key organisations, with more explicit “ownership” of the sector by racing, and direct support of horses leaving racing. Support could be extended to include assistance via non-financial mechanisms.

The introduction of a strategic framework and protocols also provides opportunities to generate funds for the sector from outside the industry. A comprehensive database of “approved” organisations, and the structure of the grants received and what these grants have funded, would assist funders with the development of a strategic overview in their funding approach. This could reference the funding and support structure developed and delivered in the USA by the Thoroughbred Aftercare Alliance.

In order to assist with the development of a funding structure to support these horses, an assessment process for horses on leaving training should be considered. The criteria for each category would be set out, and trainers (with their knowledge of the horses’ physical condition and temperament) would categorise horses on leaving training. A sliding scale of funding support would be applied according to the categorisation of each horse. This funding support would be dependent upon the adherence to criteria applied to the aftercare, and the performance and time taken to retrain each horse measured and monitored.

As an example, Racing Victoria has developed a system to categorise horses based on their physical condition and temperament on leaving training as part of the development of their Off The Track (OTT) strategy, and this model could be followed.

The schedule is shown below:

A	Physically & psychologically sound, good prospects and high market value. These horses find their own pathway.
B	Physically & psychologically sound, perceived low market value. May have physical scars.
C	Physically sound but with short term (3-6 month) spelling or rehab can become A or B. Psychologically sound.
D	Psychologically sound but physically unsound. Low or no prospects of entering equestrian. Companion type.
E	Physically and/or behaviorally unsound with no prospects for second career or dangerous.

Source: Racing Victoria





Retiring horses can be categorised as:

The promotion of the racehorse for competition and use in other equestrian disciplines is cited as one of the sector's success stories. The geographical spread of this competition and the media coverage generated provides a unique opportunity to market to a commercial sponsor, generating additional funds to ultimately result in a self-funding promotional arm for the sector, which could support the existing RoR funds derived from non-industry sources.

The introduction of the framework would also serve to provide comfort to third party grant funders. This would allow coordinated and strategic funding applications to be made to third parties, underpinned by a robust accountable organisational structure.

In summary, there is scope to develop a structured framework for funding which would:

- Highlight to the industry the costs of retraining and rehoming a horse
- Develop an enhanced funding structure across the racing industry
- Provide comfort to third party funders and entice potential commercial partnerships
- Support retrainers and rehomers
- Drive accountability.

2. Focus and integration

"There aren't enough checks and balances in the current model!"

- Retraining Centre

Firstly, a focused and independent organisation, supported via the industry and fully integrated within the HWB strategy, is recommended to specifically manage the aftercare sector, support and oversee

the organisations within it, and action the findings of this report.

The approach could include:

- Consideration should be given to the boundaries of aftercare and a definition of the scope of future responsibilities should be a priority.
- Development of an overarching aftercare strategy.
- Distribution of funds to support equine welfare from transition from racing and beyond, with a structured and accountable framework via accreditation.
- Coordination and support of funding applications to third parties.
- Development of a promotional and communication strategy.
- Liaison with third party funders to provide strategic framework and context.
- Liaison with HWB ensuring dovetailing of aftercare with other projects and initiatives arising from "A Life Well Lived".
- Liaison with racing organisations to deliver on integration of aftercare within racing policies.
- Support of retraining and rehoming centres and enhancement of relationships.
- Consideration given to a flagship industry-owned rehoming centre.
- Developing and managing relationships with equestrian disciplines and governing body.

The creation of a new set of protocols by which the aftercare sector is managed and supported would be required. Currently, the feedback from the aftercare sector is that there is a lack of clarity which erodes confidence in the sector which in turn diminishes the productive work being accomplished. It would also be charged with working with the racing industry to ensure full integration.

New protocols should look to cover, for all horses bred for the intention of racing, the following:

- The management of a new funding model, and supporting database, to centrally monitor ex-racehorses focusing on the first step out of racing.
- Link to industry-wide traceability and data work streams.
- Accreditation of all centres in the aftercare sector.
- Other areas as required, including:
 - Assessment out of training.
 - Linking to the industry approved and supported euthanasia policy.

Secondly, the promotion of the aftercare sector needs to be broadened. Whilst the RoR competition structure is recognised as a success story, and drives an interest in horses leaving racing, feedback suggests that the promotional focus could be extended and deliver a great deal of additional positive PR.

3. Traceability and data

"There is an opportunity for traceability: know where the horses are and then check up on them"

- Racehorse owner

A consistent theme through the review has been a lack of data. Though significant steps have been made to improve this area, there are still gaps in a horse's data footprint, highlighted above.

This review reiterates the findings from "A Life Well Lived" that data and lifetime traceability are core to the future of a sustainable racing industry.

The industry should continue to focus on the first transition from racing, and the provision of data

relating to the horse's whereabouts; the notification of some of which is a legal requirement. The delivery of this, with proactive monitoring of compliance, and potential sanction via the Rules of Racing, provides the opportunity to drive engagement and the creation of a sense of community with racing for the new owners. This could also measure the progress made by individual horses. There is the scope to deliver a comprehensive aftercare database, monitoring and supporting individual horses as they make their transition from racing.

Ultimately, the delivery of the University of Bristol's Thoroughbred Welfare Database, funded by The Racing Foundation, will further assist with the collation of data, and the key element of traceability. It is vital that the role of aftercare features prominently in the development of this database, and that the database should monitor traceability as horses transition into the aftercare sector.

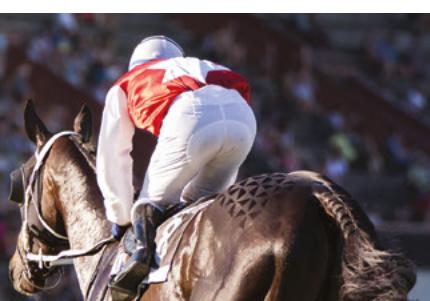
The objective and scope of the project is shown below:

Objective of the project

The objective of the project is to design and build a comprehensive Thoroughbred Welfare Database, in conjunction with Bristol University, for the horseracing industry. The aim of the database is to improve the traceability of racehorses before, during and after training, benchmark standards of thoroughbred welfare, and to inform proposed welfare initiatives within the industry going forwards.

The Thoroughbred Welfare Database should deliver:

- Live reporting of fatalities, long-term injuries and other welfare-related statistics.
- The ability to measure trends and develop predictive models for vulnerability (whether pre/post/during racing).





- Facilitate easier access to information to support decision making at a strategic level.
- Information sharing with other stakeholder groups to drive relevant projects and policy in their respective sectors.
- Monitoring traceability throughout the life of the thoroughbred from 30 day foal notification through to retirement from racing.
- The database builds on an existing concept of the individual 'Horse Profile' and will provide information on three levels.
- [Level 1] Individual horse concept will be expanded to incorporate other data sources and build a picture of an individual animal's welfare and movement history.
- [Level 2] Shows overall horse movement pathways by foal crop.
- [Level 3] Utilise Level 1 and 2 to construct welfare analysis.

4. Accreditation

"An accreditation or approved list of centres and commercial retrainers would benefit the sector immensely"

- Funder

"Rigorous accreditation that is monitored, so trainers and owners know they are good and new owners know they are reputable"

- Racecourse representative

The need for benchmarks has also been raised throughout the review. There is an opportunity to create a system of values that supports the sector and gives clarity to the role centres deliver. This would help with the need for transparency, data collection and

enable the centres to be part of a community which would create a network of support.

The review supports the development of an enhanced accreditation scheme so that centres receive a "quality mark" that comes with abiding by the agreed protocols and is an aid to define credibility, which would build on existing schemes.

The development of this scheme would provide support and inform breeders, trainers and owners of the credibility/quality of a retrainer, as well as highlighting to new owners the status of centres as approved sources of retrained horses.

Finally, accreditation opens the door to develop ties, partnership and potential funding support from third parties in the equestrian sector which would develop further opportunities for horses coming from racing. Beyond the need for a supporting body it was also felt that there was the need for greater emphasis on three other areas:

5. Community

"Develop a network to communicate and share best practice."

- Retraining centre

The benefit of accreditation would be the ability to create a community for all participants. This would allow racing to "own" the aftercare sector and develop a network to communicate and share best practice.

This could also support trainers already undertaking the retraining function and provide a framework and assistance to trainers with the scope to develop a parallel retraining opportunity to run alongside their core business.

This would benefit both charitable and commercial centres. It would provide non-financial support and engagement to commercial centres, assisting with the creation of a joined-up and inclusive network.

6. Education

"Education of breeders on responsible breeding, better education of what is involved in retraining a horse and an education piece for owners and their role"

- Rehoming charity

"Education of new owners on how to take care of a racehorse, there needs to be a balance, we don't want to scare them off"

- Racecourse representative

Education to support the aftercare sector was seen to be vital for the future success of the industry as a whole.

This takes two forms:

When in racing / education of the racing industry

- The responsibilities of owners during a horse's career
- The options available from the start of the ownership journey
- The benefits of RoR
- Ensuring trainers know of the options available
- Costs and funding
- Equestrian development option and qualifications

Post racing

- "Where are they now" updates
- Encouragement of ongoing contact
- Education of new owners: support of leisure riders (as distinct from competition riders)

7. Communication

"Disappointed that the aftercare sector – those involved in rehoming and retraining – don't have a voice"

- Patron of retraining charity

"Need pro-active communications, with the horse central to the story"

- Welfare professional

"There is a lot more recognition of aftercare and more awareness of thoroughbreds doing other careers – with a lot of high-profile horses in eventing and dressage"

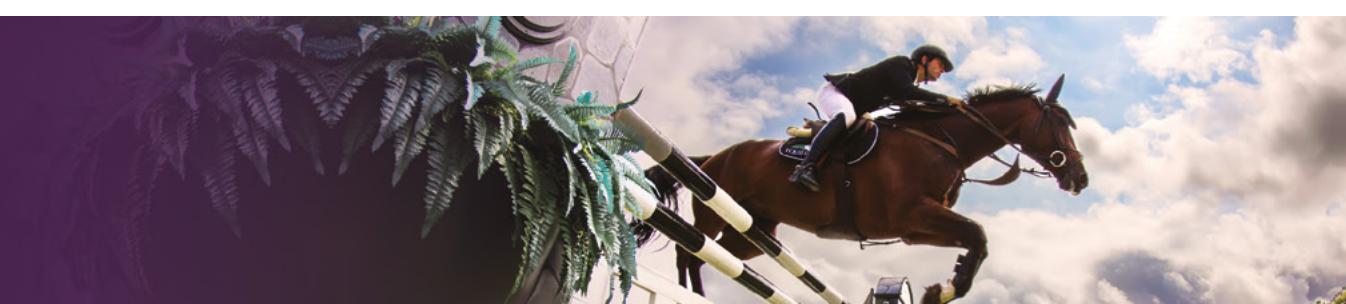
- Racecourse representative

The aftercare sector requires a dedicated communication programme. This would only be possible with the creation of a unifying body, clear data and progress in the management of the sector.

There is a recognition that a market and interest has been created in retrained racehorses, but there is a requirement for the development of a coordinated and inclusive communication and promotion strategy to leverage the considerable gains achieved to date.

Correctly developed, a clear communication strategy would create many benefits:

- Bring aftercare into the racing world, bridging the gap between racing and non-racing.
- Unite the sector.
- Scope to rename the sector to reflect role in supporting all horses bred for racing.
- Development of an official aftercare "voice" or brand.





- Enable the celebration of every horse and showcase the versatility of the thoroughbred in other equestrian pursuits.
- Allow national and regional campaigns.
- Create content for the sector to drive greater engagement.
- Alignment of euthanasia policy.
- Tackle negativity with one voice.
- Champion the sector and align to the wider equine welfare communications strategy.

Summary of findings

The investigation, data and consultation process, although not conclusive or exhaustive, highlights key building blocks, issues and opportunities in the aftercare sector of horseracing.

The overriding sentiment is that the aftercare sector is fragmented, lacking in structure and cohesion. This in turn leads to funding problems and other tactical issues – communications, community, promotion and education. Some of the weaknesses of the aftercare sector dovetail with other findings from the HWB's "A Life Well Lived", most notably the concern over data and traceability.

Next steps

The Aftercare Funding Review and its Recommendations underpin the development of a strategic plan for the Aftercare Sector which is currently underway.

Key to the evolution of the sector is the requirement for one organisation to provide strategic support and direction. There is little appetite for the creation of a new body to do this, and the RoR is widely regarded as the organisation most suited to development into this broader role. It is therefore vital that the racing industry, and crucially funders, recognise the need for RoR to be supported to effect the changes necessary to achieve this and to deliver the recommendations of this Review.

This will allow the growth of RoR as the organisation which aligns the interests of racing and aftercare, and further develops key links with organisations outside

racing. With support of the industry, funders and the Horse Welfare Board, RoR would receive the support and investment required to deliver the expansion of its role. This in turn will require RoR to work closely with all parties related to the fulfilment of the Aftercare Funding Review and the strategic plan.

There is an understanding of the extent of the benefits that can be gained through the delivery of the Review, together with an acknowledgement that success will only be achieved through collaboration and engagement, both inside and outside of racing.

The development of a sustainable and united Aftercare sector is a vital element in the delivery of the Horse Welfare Board's "A Life Well Lived" strategy and is integral to the racing industry. The investment in this Review and its next steps recognises this and underlines the commitment to delivering success.

Appendices

Appendix 1	Steering group terms of reference
Appendix 2	Consultation list
Appendix 3	Consultation framework
Appendix 4	Consultation results overview
Appendix 5	Survey distribution
Appendix 6	Survey methodology
Appendix 7	Aftercare Survey analysis summary

Appendix 1

Steering Group Terms of Reference

To oversee the development and delivery of the Aftercare Review project to ensure the report produced is one they are able to endorse and recommend to the HWB and other stakeholders:

- Attendance at Zoom meetings.
- Interim meetings with full/partial steering group as necessary.
- To provide advice/support to project resource.
- Join Industry consultation calls with project resource as necessary.
- To provide advice regarding recommendations/ initiatives.
- Steering group to have oversight and take ownership of papers ahead of submissions to full HWB/Racing Foundation Trustees.
- Oversight of timeline to assist in providing measurement, structure and accountable targets.
- To provide feedback on development of strategy and paper.
- Will be provided with update reports to map progress, raise risks/issues.





Appendix 2

Consultation List

Name	Organisation	Sector	Contact/call
Rob Hezel	Racing Foundation	Funding	13/07/2020
Pam/Kevin Atkinson	New Beginnings	Rehoming	13/07/2020
David Sykes	HWB, BHA	Industry	14/07/2020
Dr David Ray	Racehorse Sanctuary	Rehoming	14/07/2020
Nic de Brauwere	Redwings	Rehoming	14/07/2020
Tansy Challis	Racing Foundation	Funding	16/07/2020
Amanda Mills	Mills Stables Retraining Racehorses	Retrainer	16/07/2020
Graham Oldfield	Racehorse Sanctuary	Rehoming	16/07/2020
Gillian Carlisle	BTRC	Rehoming	16/07/2020
Annie Dodd	HBLB	Funding	16/07/2020
Mark Johnston	Racing Foundation/Trainer	Trainer	21/07/2020
Roly Owers	World Horse Welfare	Welfare	22/07/2020
Rupert Arnold	NTF	Trainer	22/07/2020
George McGrath	NARS	Racing Staff	24/07/2020
Diana Cooper	Godolphin	Owner/breeder	24/07/2020
Penny Taylor	Godolphin	Owner/breeder	24/07/2020
Nigel Payne	Sir Peter O'Sullevan Charitable Trust	Funding	27/07/2020
Charles Barnett	Large Independent Racecourses	Racecourse	27/07/2020
Nick Alexander		Trainer	28/07/2020
Grace Muir	Heros	Rehoming	28/07/2020
Claire Sheppard	Thoroughbred Breeders' Association	Breeder	29/07/2020
Eliot Forbes	Animark/IFAR	International	30/07/2020
Paul Struthers	PJA	Jockey	30/07/2020
Di Arbuthnot	RoR	Charity	31/07/2020

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Name	Organisation	Sector	Contact/call
Fiona Denniff		Breeder	03/08/2020
Lady Emma Balding	RoR	Charity	04/08/2020
Jennifer Hughes	Racing Victoria	International	05/08/2020
Sue Elsdon	Northmore Stud	Breeder	05/08/2020
Mary Frances	Moorcroft Equine Rehabilitation Centre	Rehoming	10/08/2020
Jenny Hall	RoR	Charity	10/08/2020
Philippa Gilmore	RoR	Charity	10/08/2020
Helen Yeadon	Greatwood	Rehoming	11/08/2020
David Muir	ex-RSPCA	Welfare	11/08/2020
Anthea Morshead	York/Cartmel Racecourses	Racecourse	12/08/2020
Dan Abraham	Foxtrot Racing	Owner	12/08/2020
Fiona Needham	Catterick Racecourse	Racecourse	13/08/2020
Dawn Goodfellow	Racing Welfare	Industry	13/08/2020
Janet Davies		Owner	17/08/2020
Tasha Rose	Hong Kong Jockey Cub	International	17/08/2020
Iain Graham	BEF/British Showjumping	Non-racing	17/08/2020
Nick Rust	BHA	Industry	18/08/2020
Laurence Bellman		Owner	18/08/2020
Kim Bailey		Trainer	19/08/2020
Adam Waterworth	Goodwood Racecourse	Racecourse	19/08/2020
Ed Harper	Whitsbury Manor Stud	Breeder	20/08/2020
James Hick	BHS	Non-racing	20/08/2020
Lisa-Jane Graffard	Au-delà des Pistes/Godolphin	International	20/08/2020
Julian Dollar	Newsells Park Stud	Breeder	24/08/2020
Vicky Smart		Retrainer	25/08/2020
Anthony Stirk	ex-BHA Senior Vet	Industry	25/08/2020





Consultation List

Name	Organisation	Sector	Contact/call
Celia Djivanovic		Owner	02/09/2020
Simon Mockridge	Juddmonte	Breeder	02/09/2020
Lucy Ralph	Blue Cross/ex BHA	Other	03/09/2020
Jeff Hobby	Brightwalton Stud	Breeder	03/09/2020
Siobhan Mullan	University of Bristol	Researcher	04/09/2020
Tim Kent	Goffs	Saleshouse	08/09/2020

Appendix 3

Consultation framework

Schedule of questions

Introduction to set the scene, reminds participants of how their answers will be used, anonymity etc, so all participants are on the same page.

Background

- What does aftercare mean to you – at what point should a horse be considered for “aftercare”?
- Is this different, in your mind, from a horse that has exited horseracing?
- Should all horses bred for racing be included within the scope of the project?

- Is there an aftercare “community” where information is shared and support provided?

Looking ahead

- What would be your ideal aftercare plan/package for a horse formerly in training?
- What are the barriers to achieving this?
- Are there other jurisdictions which set a good example? If so, why?
- What should it look like?
- Who should be involved?
- How should it be funded?
- Who should oversee it?
- How should it be overseen?

Current model

- Do you believe there to be a structure/ model?
- What is your view of the current retirement/ aftercare picture?
- What do you see as the current model’s strengths?
- What do you see as the current model’s threats?
- What do you see as the current model’s weaknesses?
- What do you see as the current model’s opportunities?

Focus on “exit points”

- What do you see as the key points that horses exit the racing community?
- Where do they go from here?
- How do we monitor them?
- How should we manage them?

Appendix 4

Consultation results overview

Further to the data collected the review also carried out a consultation process, talking to 56 people from the following sectors:

- Charitable rehomer/retrainer
- Commercial rehomer/retrainer
- Trainer
- Breeder
- Owner
- Jockey
- Funder
- Regulator
- International jurisdiction
- Racecourse
- Saleshouse
- Researcher
- Non-racing welfare organisation
- Equestrian

The feedback has been summarised below:

Positives

- The current model is recognised as doing good work and has increased the value of the racehorse.
- Where there is accreditation it gives confidence.
- VHS allows for funding for the most critical cases which all care centres can receive.
- There is enormous goodwill across the industry – the importance of aftercare is recognised by the industry.

Negatives

- There are no regulations, structure, strategy or clarity for racing's activity in the aftercare sector.
- The aftercare community lacks cohesion and suffers from perceived in-fighting.
- The aftercare sector does not feel part of racing.
- There is a lack of data, notably around traceability.
- Transparency of the sector is lacking.
- Too much reliance on charities.

- There is subjectivity around what is a vulnerable horse
- Lack of cohesion between RoR and the rest of the sector
- Industry lulled into false sense of security by charitable/granted contributions without understanding the full picture
- Perceived focus on “competition” for horses

Opportunities

- Opportunity to define a purpose, accountability, and develop a body with overarching responsibility.
- Improve and refine available data to inform future activity.
- Enhanced use of available resources.
- Stronger common identity/branding.
- Introduction of “Quality Mark” for centres.
- Promotion of “success” stories.
- Broaden the scope to all horses bred for racing.
- Commercial third party sponsorship.
- Joined-up communications.
- Aftercare to become embedded into industry education and courses.

Threats

- Perception that horses are “rescued” from racing.
- Lack of unity.
- Small number of horses currently accommodated, and this could affect public opinion if widely known.
- Lack of a structured and robust **euthanasia policy**.
- Potential negative PR if implementation of revised funding structure impacts on charities.





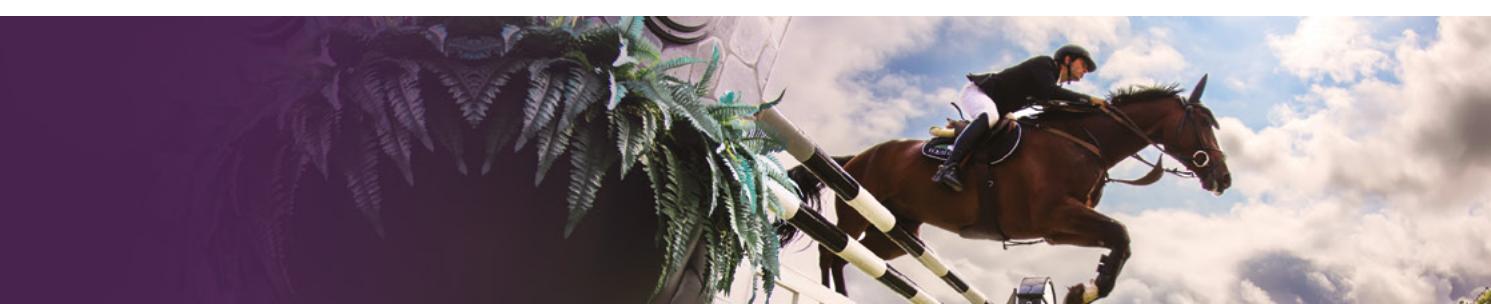
Appendix 5

Survey distribution list

Contact Name	Centre/Company Name	Charitable/Professional	RoR Accredited
Clare Poole	Team Clare Poole – Thoroughbred Versatile	Professional	Yes - on website
Lisa Smith	Guildhouse Sports Horses	Professional	Yes - on website
Kathryn Warnett	Yorkshire Racehorse Retraining & Rehoming	Professional	No
Hetty King	Regal Racehorse Rehoming	Professional	No
Lou Burns	LB Equine	Professional	Yes
Miranda Theobald	-	Professional	Yes
Fred and Rowena Cook	Equine Management and Training	Professional	Yes - on website
Kylie Manser	Kylie Manser-Baines RoR Retrained & Project Thoroughbred Ex-Racehorses	Professional	Yes - on website
Katie-Jo Nixon	P&K Nixon	Professional	Yes - on website
Louise Robson	Thoroughbred Dressage	Professional	Yes - on website
Sophie Spiteri	Spiteri Retraining	Professional	Yes - on website
Katy Price	Katy Price Racing	Professional	No
Kevin Jardine	Solway Racehorses	Professional	No
Rachel Geary	-	Professional	No
Bryan Smart	Bryan Smart Racing	Professional	No
Pippa Boyle / Jim Boyle	Jim Boyle Racing	Professional	No
Vici and Rich Morse	Vici and Rich Morse Equestrian and Bloodstock	Professional	No
Sarah Arthur	HAPPA	Charity	Yes
Jo Massey	Racehorse Relief	Charity	No
Charlotte Martin	Charlotte Martin Equine Services	Professional	Yes
Kate Mieczkowska	Hooked on Polo	Professional	Yes - on website

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Contact Name	Centre/Company Name	Charitable/ Professional	RoR Accredited
Sarah/Hannah Clarke	-	Professional	Yes - on website
Gemma Vernon	Grange Farm	Professional	No
Karen Watson	-	Professional	No
Graham Oldfield	Racehorse Sanctuary	Charity	No
Amanda Mills	Mills Stables Retraining Racehorses	Professional	Yes
Gillian Carlisle	BTRC	Charity	No
Grace Muir	Heros	Charity	Yes
Pam/Kevin Atkinson	New Beginnings	Charity	Yes
Mary Frances	Moorcroft Racehorse Welfare Centre	Charity	No
Helen Yeadon	Greatwood	Charity	Yes
Derek Shaw	Derek Shaw Racing	Professional	Yes - on website
Jody Sole	Jody Sole Equestrian	Professional	Yes - on website
Louise Howaston	Louise Howaston Equine Services	Professional	No
Tim Billington	Pangfield Farm	Professional	No
Nikki Graham	Nikki Graham Equine	Professional	Yes - on website
Robyn Gray	Hole House Farm	Professional	Yes - on website
Jason and Helen Newbold	Newbold Equine	Professional	Yes - on website
Shani Payne	Peopleton Brook Racehorse Care	Professional	Yes - on website
Guy Robertson	Guy Robertson Horsemanship	Professional	Yes - on website
Jackie Storey	Retrained Racehorses - Team Storey	Professional	Yes - on website
Dan Titterton	MCF Equestrian	Professional	Yes - on website





Survey Distribution List

Contact Name	Centre/Company Name	Charitable/Professional	RoR Accredited
Claire Hart	Claire Hart Equine	Professional	Yes - on website
Kate Turner	Cheveral House Racehorse Rehoming Centre	Professional	No
Jeremy Naylor	Cleeve Stables	Professional	No
P Bickerton	Almington House	Professional	No
Dan Wain	Dan Wain Equestrian Limited	Professional	No
Tessa Westlake	Racehorse Rehoming Centre	Charity	No
Nigel	Racehorse Rescue Centre	Charity	No
-	Bourton Vale Equestrian Centre	Professional	No
Erin Cullimore	Erin Cullimore Equestrian	Professional	No
Sharon Blake	SB Racehorse Rehoming	Professional	No
Mark Rutherford	Durham Sport Horse Rehabilitation	Professional	Yes
Marisa Blades	-	Professional	Yes
Abbie Rayner	Fairview Stables Eventing & Re-Training ex racehorse	Professional	No
James White	Irish Sports Horse Imports	Professional	No
Nic de Brauwere	Redwings	Charity	No
Sharon Moore	Moore Racehorse Trust and Animal Sanctuary	Charity	No

Appendix 6

Survey methodology

Contact details for a range of charitable centres and commercial yards involved in the retraining and/or rehoming of ex-racehorses were gathered from the following:

- The list of centres on the RoR website
- The list of retrainers on the RoR website
- A list of charities/commercial operations who had been involved with some previous work led by the BHA in 2018
- Facebook pages and groups
- Word of mouth of people known to be operating in the aftercare sector

The survey was created using Survey Monkey, there were 55 questions in total. The survey link was shared via email – two separate emails were created; one to be sent to those that had already been involved in the consultation process, who were aware of the survey and one to those that had not been involved. Both emails included the press release announcing the project, as well as a short introduction to the project and the importance of the survey. Emails were sent on Friday 7th August, with a closing date listed as Friday 14th August.

A reminder email was then sent individually to each contact who had not yet completed the survey on Thursday 13th August to remind them and inform them that the deadline had been moved to Monday 17th August. A further reminder email was sent on Wednesday 26th August to all those who had not yet completed the survey and encouraged them to complete as soon as possible. Follow-up phone calls were made to those who had not yet completed the survey on 9th and 10th September.

The survey was analysed by the automatic Survey Monkey analysis feature as well as using Excel to further analyse the data.

The data was broken down into the type of centre/yard as indicated by the response to question four in the survey – this allowed the data to be further broken down into charitable, commercial or both. Two of the respondents selected both as their answer.

The data analysis was put into bands (e.g. £1000 - £5000), the bands used in the analysis were based upon the individual question and the responses that were given. Although the survey asked for exact numbers in the responses, as the text boxes were open answers some of the responses included words or data ranges and not an exact figure. Where respondents entered a word as opposed to a number, this was changed to N/A for the analysis.

Where respondents gave a figure range as their answers (e.g. 100 – 200) the data range in the analysis was undertaken to ensure this could be incorporated within that data range without having to change the answer. If this could not be done, then a midway point was selected between the two figures provided.

The qualitative data collated from questions 6, 10, 36, 47, 54 and 55 was analysed by selecting key quotes and grouping them into key themes for each of the questions.

Some respondents felt that some of the questions were not applicable to them, so were asked to input N/A into the answer box for those questions.





Appendix 7

Aftercare Survey analysis summary

Research was commissioned to understand how key figures in aftercare viewed the sector. A total of 31 completed surveys were received (out of 61 – a 50% return - this is above the industry average).

The key facts are highlighted below:

Financials	Retraining purpose and return
<ul style="list-style-type: none">68% of rehoming centres consider themselves to be commercial entitiesThe average monthly cost for keeping a horse is £54032% said their main source of income was via donations or charitable work10% was via training10% was selling22% was from other sources including schooling or livery work87% get no external funding	<ul style="list-style-type: none">61% are rehomed for RoR competitions or other competitions930 horses were retrained by respondentsThe majority (84%) allow horses to be returned
Capacity	VHS
<ul style="list-style-type: none">90% can cater for 50 horses or less51% currently have 10 horses or less48% have had to turn a horse away in 2019	<ul style="list-style-type: none">45% have received at least one horse in the last year from the RoR's VHS
Employees	General feedback
<ul style="list-style-type: none">80% have 5 employees or less43% utilise volunteers	<ul style="list-style-type: none">71% work on a regional basis vs. local or national55% thought the sector was not well promoted, or not promoted at all94% thought the sector needs to be overseen by an industry body71% thought that aftercare for racehorses should cover any racehorse bred for racing (not just those that made it to a racecourse)

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