

Uddiyana Trust

England & Wales · Charity number 1046398

Details

Other names	F W B O - UDDIYANA, THE FRIENDS OF THE WESTERN BUDDHIST ORDER (UDDIYANA), TRIRATNA BUDDHIST COMMUNITY (UDDIYANA), Urgyen Sangharakshita Trust
Status	Registered
Legal form	Other
Registered	1995-05-17
Register	View on the Charity Commission register

Contact

Address	Adhithana Coddington Ledbury HR8 1JL
Phone	01531 641726
Email	urgyenhouse@gmail.com

Activities

Objects: THE ADVANCEMENT OF THE BUDDHIST RELIGION

Activities: PRESERVATION OF THE LEGACY OF URGYEN SANGHARAKSHITA (1925 - 2018), FOUNDER OF THE TRIRATNA BUDDHIST COMMUNITY (FORMERLY FWBO), INCLUDING THE SANGHARAKSHITA LIBRARY, URGYEN HOUSE AND HIS LITERARY, PHOTOGRAPHIC AND AUDIO ARCHIVES, AIMING TO MAKE THESE ACCESSIBLE AS APPROPRIATE TO FUTURE GENERATIONS.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Religious Activities
- **Who:** The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£82,666	£78,462	-	-
2023-12-31	£64,850	£95,182	-	-
2022-12-31	£72,542	£70,752	-	-
2021-12-31	£49,766	£50,061	-	-
2020-12-31	£52,839	£39,545	-	-

Trustees

Name	Role	Appointed
DAMON PETERSON	Chair	
ANDREW GOODMAN		2002-06-15
Garry Pierpoint		2022-04-21
Hana Dilley		2024-02-29

Uddiyana Trust

England & Wales - Charity number 1046398

Accounts

UDDIYANA TRUST

AGM
ANNUAL
REPORT

17 OCTOBER 2025



AGM FOR UDDIYANA TRUST (WORKING NAME: URGYEN SANGHARAKSHITA TRUST) - YEAR ENDING 31 DECEMBER 2024

Held on Friday 17 October 2025 at 14.00

Members present:

Andrew Goodman (Mahamati)
Damon Peterson (Paramartha) (Chair)
Garry Pierpoint (Mokshapriya)
Hana Dilley (Prajnanita)

Invited:

Visarada (Book keeper)

All members were informed of AGM.

1. MINUTES OF PREVIOUS MEETING

The minutes of the AGM for 2024 were passed as correct.

2. CHAIR'S REPORT

This report covers our sixth full year of operation since the death of Sangharakshita on 30 October 2018. During this period the Trust continued its refocus on preserving and sharing the legacy of Ugyen Sangharakshita's life and teachings. Here were some of our key activities:

- We continued to add images to the Triratna Picture Library, which is becoming a valuable visual archive of Sangharakshita's life and Triratna's first 50 years.
- The Triratna Video Library also grew, with volunteers continuing to add subtitles in nine different languages. In the autumn 2024 two new videos were released: 'A few words' From Sangharakshita on his 80th Birthday' and 'Sangharakshita Launches 'The Buddhist Vision'. The digitisation and databasing of our video archive of 3,000 tapes was completed. A second server was bought and ensured a back-up of all video archive material. Once an archival system is introduced for the Trust the video archive will be added to that system for future access.

UST AGM MINUTES

- We continued to develop sangharakshita.org as a portal to his life and teachings.
- We maintained our funding of the editing and publication of Sangharakshita's Complete Works. The final volumes, including an extraordinary Concordance, was published in the autumn of 2024.
- We continued to support Suryaprabha's film work through promotion and looking after the Lights In The Sky website.
- We helped plan the celebrations for Sangharakshita's 100th birth anniversary with other Triratna key players and created a special logo and strap line.
- We introduced a donor management system which dovetails with our financial systems.
- We initiated an investigation into archival systems and possible grant funding in order to prepare for the archiving of Sangharakshita's documents (letters, papers, diaries etc).
- Two Urygen House video blogs were produced in 2024. 'William Blake' was released in May and 'With Hands Folded in Reverence' was released in November.

This year the Trust saw some changes in personnel and roles. Up until mid October this work was very effectively led and overseen by our Director Prajnaketu, working three days a week. He was helped by Mokshapriya (Urygen House and Media Archiving), Suryanaga (Communications and Design), Visarada (Finance Manager), and Shantavira (Donor Care and Admin). Mokshapriya took over the role of Director and I accepted the position of Chair taking over from Amalavajra who had to step down as our much appreciated Chair and Trustee due to other commitments. Suryanaga also stepped down from his part-time role looking after web design and fundraising. Thank you all.

None of our work would have been possible without the generosity of our donors to whom we remain very grateful. The Trust also works closely with our institutional partners, FutureDharma Fund, Windhorse Publications, Dharmachakra, Adhithana, and many Buddhist centres, all of whom have contributed considerably to meeting our objectives.

Finally, I would like to thank the Trustees and the Literary Executors for giving their time freely and for fulfilling their responsibilities with due diligence.

Dharmachari Paramartha

Chairman, The Uddiyana Trust (Urygen Sangharakshita Trust) 17 October 2025

3. TREASURER'S REPORT

The Treasurer presented the accounts for the year ended 31st December 2024, which are reported on by Annemie Philips, our independent examiner. The Trustees accepted the accounts and a copy will be forwarded to the Charity Commission.

4. REVIEW OF MEMBERSHIP

The following wish to continue as members of The Uddiyana Trust: Terence Pilchick (Nagabodhi), Alexander Kennedy (Subhuti), Andrew Goodman (Mahamati), Raymond Fricker (Sona), Ian Waddell (Dhammarati), Christina Robertson (Dayanandi), Colin Warren (Surata), Richard Hutton (Padmavajra), Robin Collett (Cittapala), Damon Peterson (Paramartha), Hugh Evans (Buddhadasa), Matthew Webb (Amalavajra), Alison Wray (Punyamala), Garry Pierpoint (Mokshapriya) and Hana Dilley (Prajnanita).

5. PROPOSAL OF TRUSTEES

The following persons were proposed and accepted as Trustees:

Garry Pierpoint (Mokshapriya) (proposed by Prajnanita and seconded by Mahamati)
Damon Peterson (Paramartha) (proposed by Mahamati and seconded by Mokshapriya)
Hana Dilley (Prajnanita) (proposed by Mokshapriya and seconded by Paramartha)
Andrew Goodman (Mahamati) (proposed by Paramartha and seconded by Prajnanita)

The Uddiyana Trust
Annual Accounts 2024
Balance Sheet

	2024	2023	Notes
	£	£	
Fixed Assets	322,042	322,042	1
<u>Current Assets</u>			
Cash	58,132	56,723	2
Debtors	0	3,578	3
Total Assets	<u>380,173</u>	<u>382,343</u>	
<u>Liabilities</u>			
Current Liabilities	2,624	2,976	4
Total Liabilities	2,624	2,976	
Total Net Assets	<u>377,549</u>	<u>379,367</u>	
<u>Represented by</u>			
General Accumulated Fund	362,307	358,103	
Restricted Funds	15,241	21,100	
Total Funds	<u>377,547</u>	<u>379,203</u>	

The Uddiyana Trust
Notes to the 2024 Balance Sheet

	2024	2023
1. Fixed Assets	£	£
Display cabinets	0	1,368
Artefacts and Library	314,400	314,400
Computer hardware	7,642	6,111
Total fixed assets	<u><u>322,042</u></u>	<u><u>321,879</u></u>

Sangharakshita donated all his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance company at £314,400 which is the figure included in the balance sheet. Depreciation is not applied to these assets.

	2024	2023
2. Bank balances	£	£
Co-op current accounts	20,655	21,137
COIF support	36,737	34,917
PayPal	640	669
Stripe	100	
Total cash at bank	<u><u>58,132</u></u>	<u><u>56,723</u></u>

3. Debtors		
Gift Aid due on donations for prior year	0	2,619
Work owed by supplier	0	959
	<u>0</u>	<u>3,578</u>

4. Current Liabilities		
Accrued expenses		
- Office rent 2022 and 2023	0	1,840
- Independent examiner fee for this years accounts	200	200
- Supplier labour and expenses	1,649	936
Overclaimed gift aid due for repayment	812	
Payroll liabilities	-37	
	<u>2,624</u>	<u>2,976</u>

The Uddiyana Trust
2024 Depreciation schedule

Depreciation is calculated at 25% of cost	Total	Artefacts	Display cabinets	Computer hardware
Cost	331,833	314,400	5,208	12,225
Accumulated depreciation to 2023	5,877	0	3,840	2,037
Charge for the year	3,915	0	1,368	2,547
Net book value	322,042	314,400	0	7,642

The Uddiyana Trust
Statement of Financial Activities 2024

	General Funds	Restricted	2024	2023	Notes
INCOMING RESOURCES	£	£			
Earned income	1,716	0	1,716	1,538	
Gifts and donations	63,876	2,321	66,196	39,918	
Bank Interest	1,820	0	1,820	2,097	
Gift Aid tax	4,552	0	4,552	5,516	
Grants	10,000	0	10,000	11,500	6
Other Income	703	0	703	4,281	7
TOTAL INCOMING RESOURCES	<u>82,666</u>	<u>2,321</u>	<u>84,986</u>	<u>64,850</u>	
RESOURCES EXPENDED					
Charitable Expenditure					
Direct Charitable Expenditure	47,714	8,180	55,894	68,779	
Total Charitable Expenditure	47,714	8,180	55,894	68,779	
Charity Administration					
General Overheads	30,748		30,748	26,403	
Total Administrative Expenditure	30,748		30,748	26,403	
TOTAL RESOURCES EXPENDED	<u>78,462</u>	<u>8,180</u>	<u>86,642</u>	<u>95,182</u>	
NET INCOME/EXPENDITURE	<u>4,204</u>	<u>-5,860</u>	<u>-1,656</u>	<u>-30,332</u>	
Reconciliation of funds					
Balance brought forward	358,103	21,100	379,203	409,535	
Transfers between funds	0	0	0	0	
Balance carried forward	<u>362,307</u>	<u>15,241</u>	<u>377,547</u>	<u>379,203</u>	

The Uddiyana Trust
2024 Statement of Financial Activities - Expenditure Detail

Year ended 31 December 2024

	2024	2023	Notes
Charitable Expenditure			
<i>General Fund</i>			
Urgyen House	6,952	9,706	8
Literary Executors	4,078	3,800	
Sangharakshita Complete Works	27,397	32,303	
Other project delivery	9,287	15,160	9
 <i>Restricted Funds</i>			
Triratna Picture Library	3,170	2,108	
Triratna Video Library	5,010	5,702	
	55,894	68,779	

General Administrative Expenditure

Bank Charges	490	453
Accounting fees	200	350
Insurance	535	542
Software	2,887	1,872
Websites	1,585	1,237
Meetings and Travel	803	290
Stationery	0	0
Staff costs	19,525	16,051
Fundraising	49	283
Depreciation	3,915	3,404
Room hire (Shantavira office)	759	1,840
Other costs	0	82
	30,748	26,403

The Uddiyana Trust
Notes to the 2024 Statement of Financial Activities

6. Sangharakshita Complete Works Grant

The 2024 grant income is from the Windhorse Trust to support the Complete Works project.

7. Other income

This includes £703.11 representing reversal of a payroll liability which was determined to be no longer required following a review of PAYE payroll obligations

8. Urgyen House expenditure

These costs include the rent charged by Adhithana for the Urgyen House annex which is maintained by Uddiyana Trust

9. Other project delivery

This category captures 90% of staff costs associated with the Digital Media Manager. 90% of this role is allocated to work directly fulfilling Charity objectives.

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

31 December 2024

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2024.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 15/09/2025

Name: Annemie Philips (Satyapara) FCCA

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address: 9 Linden Road, Hampton, TW12 2JG

Uddiyana Trust

England & Wales - Charity number 1046398

Accounts



18 OCTOBER 2024

URGYEN SANGHARAKSHITA TRUST

AGM MINUTES

AGM FOR URGYEN SANGHARAKSHITA TRUST (WORKING NAME FOR UDDIYANA TRUST) - YEAR ENDING 31 DECEMBER 2023

Held online on Friday 18 October 2024 at 16.30

Members present:

Andrew Goodman (Mahamati)
Damon Peterson (Paramartha) (Treasurer)
Garry Pierpoint (Mokshapriya)
Hana Dilley (Prajnanita)

Apologies:

Matthew Webb (Amalavajra) (Chairman) due to illness.

All members were informed of AGM.

1. MINUTES OF PREVIOUS MEETING

The minutes of the AGM for 2023 were passed as correct.

2. CHAIR'S REPORT

This report covers our fifth full year of operation since the death of Sangharakshita on 30 October 2018. During this period the Trust continued its refocus on preserving and sharing the legacy of Urgyen Sangharakshita's life and teachings. Here were some of our key activities:

- We continued to add images to the Triratna Picture Library, which is becoming a valuable visual archive of Sangharakshita's life and Triratna's first 50 years.
- The Triratna Video Library also grew, with volunteers adding subtitles in nine different languages. Our offline video archive of 3,000 tapes is now almost completely digitised.
- We continued to develop sangharakshita.org as a portal to his life and teachings. In 2023 we worked towards a truly searchable catalogue of all of Bhante's work.
- We maintained our funding of the editing and publication of Sangharakshita's Complete Works. The final volumes, including an extraordinary Concordance, will be published towards the end of 2024.

- We financed the making of Suryaprabha's new film Great Ocean - Abiding. This film, the fourth in the series, adds great depth and colour to Sangharakshita's life through hearing about his friendships.
- In October 2023 we marked the fifth anniversary since Sangharakshita's death. We told the story of his last days and funeral, and led a social media campaign celebrating how much Triratna has continued to grow in these past five years.
- At the end of 2023, we prepared and launched a new exhibition at Sangharakshita's last home, Ugyen House, called Foundations. This focuses on the pivotal years of 1964–1970 when Sangharakshita returned to England, led the nascent English Sangha, and after a dramatic dismissal, founded a new Buddhist movement.

This work was very effectively led and overseen by our Director Prajnaketu, working three days a week. He was helped by Mokshapriya (Ugyen House and Media Archiving), Suryanaga (Communications and Design), Visarada (Finance Manager), and Shantavira (Donor Care and Admin). Thank you all.

None of this would have been possible without the generosity of our donors to whom we remain very grateful. The Trust also works closely with our institutional partners, FutureDharma Fund, Windhorse Publications, Dharmachakra, Adhisthana, and many Buddhist centres, all of whom have contributed considerably to meeting our objectives.

Finally, I would like to thank the Trustees and the Literary Executors for giving their time freely and for fulfilling their responsibilities with due diligence.

Dharmachari Amalavajra

3. TREASURER'S REPORT

The Treasurer presented the accounts for the year ended 31st December 2023, which are reported on by Annemie Philips, our independent examiner. The Trustees accepted the accounts and a copy will be forwarded to the Charity Commission.

4. REVIEW OF MEMBERSHIP

The following wish to continue as members of Triratna Buddhist Community (Uddiyana): Terence Pilchick (Nagabodhi), Alexander Kennedy (Subhuti), Andrew Goodman (Mahamati), Raymond Fricker (Sona), Ian Waddell (Dhammarati), Christina Robertson (Dayanandi), Colin Warren (Surata), Richard Hutton (Padmavajra), Robin Collett (Cittapala), Damon Peterson (Paramartha), Hugh Evans (Buddhadasa), Matthew

Webb (Amalavajra), Alison Wray (Punyamala), Garry Pierpoint (Mokshapriya) and Hana Dilley (Prajnanita).

5. PROPOSAL OF TRUSTEES

The following persons were proposed and accepted as Trustees:

Garry Pierpoint (Mokshapriya) (proposed by Mahamati and seconded by Prajnanita)

Damon Peterson (Paramartha) (proposed by Prajnanita and seconded by Mahamati)

Hana Dilley (Prajnanita) (proposed by Mahamati and seconded by Paramartha)

Andrew Goodman (Mahamati) (proposed by Mokshapriya and seconded by Prajnanita)

Amalavajra communicated in writing that he did not wish to stand again as trustee and the meeting accepted this with thanks for all his years as a trustee.

Amalavajra

Chairman, The Urgyen Sangharakshita Trust (Uddiyana Trust) 18 October 2024

The Uddiyana Trust

Annual Accounts 2023

Balance Sheet

	2023	2022	Notes
	£	£	
Fixed Assets	321,879	325,283	1
Current Assets			
Cash	56,723	88,946	2
Debtors	3,578	2,619	3
Total Assets	382,180	416,848	
Liabilities			
Current Liabilities	2,976	2,339	4
Creditors	0	4,974	5
Total Liabilities	2,976	7,313	
Total Net Assets	379,205	409,535	
Represented by			
General Accumulated Fund	358,103	395,943	
Restricted Funds	21,100	13,592	
Total Funds	379,203	409,535	

The Uddiyana Trust

Notes to the 2023 Balance Sheet

	2023	2022
1. Fixed Assets	£	£
Display cabinets	1,368	2,735
Artefacts and Library	314,400	314,400
Computer hardware	6,111	8,148
Total fixed assets	321,879	325,283
<p>Sangharakshita donated all his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance company at £314,400 which is the figure included in the balance sheet. Depreciation is not applied to these assets.</p>		
	2023	2022
2. Bank balances	£	£
Co-op current accounts	21,137	28,427
COIF support	34,917	52,820
PayPal	669	7,699
Total cash at bank	56,723	88,946
3. Debtors		
Gift Aid due on donations for prior year	2,619	2,619
Work owed by supplier	959	
	3,578	2,619
4. Current Liabilities		
Accrued expenses		
- Office rent 2022 and 2023	1,840	
- Independent examiner fee for 2023 accounts	200	450
Payroll liabilities	936	1,889
	2,976	2,339
5. Creditors		
Trade creditors	0	4,974

The Uddiyana Trust				
2023 Depreciation schedule				
Depreciation is calculated at 25% of cost	Total	Artefacts	Display cabinets	Computer hardware
Cost	327,756	314,400	5,208	8148.05
Accumulated depreciation to 2022	2,473	0	2,473	0
Charge for the year	3,404	0	1,367	2037.01
Net book value	321,879	314,400	1,368	6,111

The Urgyen Sangharakshita Trust

Statement of Financial Activities 2023

	General Funds	Restricted	2023	2022	Notes
INCOMING RESOURCES	£	£			
Earned income	1,348	190	1,538	1,240	
Gifts and donations	38,203	1,715	39,918	54,132	
Bank Interest	2,097	0	2,097	510	
Gift Aid tax	5,516	0	5,516	2,626	
Grants	11,500	0	11,500	14,033	6
Other Income	4,281	0	4,281	0	
TOTAL INCOMING RESOURCES	62,946	1,905	64,850	72,542	
RESOURCES EXPENDED					
Charitable Expenditure					
Direct Charitable Expenditure	60,969	7,810	68,779	44,466	
Total Charitable Expenditure	60,969	7,810	68,779	44,466	
Charity Administration					
General Overheads	26,403		26,403	26,286	
Total Administrative Expenditure	26,403		26,403	26,286	
TOTAL RESOURCES EXPENDED	87,372	7,810	95,182	70,752	
NET INCOME/EXPENDITURE	-24,426	-5,906	-30,332	1,789	
Reconciliation of funds					
Balance brought forward	395,943	13,592	409,535	407,746	
Transfers between funds	-13,414	13,414			7
Balance carried forward	358,103	21,100	379,203	409,535	

The Uddiyana Trust				
2023 Statement of Financial Activities - Expenditure Detail				
Year ended 31 December 2023				
	2023	2022		Notes
Charitable Expenditure				
<i>General Fund</i>				
Urgyen House	9,706	8,110		8
Literary Executors	3,800	3,800		
Sangharakshita Complete Works	32,303			
Other project delivery	15,160	22,110		9
<i>Restricted Funds</i>				
Triratna Picture Library	2,108	6,346		
Triratna Video Library	5,702	4,100		
	68,779	44,466		
General Administrative Expenditure				
Bank Charges	453	448		
Accounting fees	350	225		
Insurance	542	4,457		
Software	1,872	2,054		
Websites	1,237	1,022		
Meetings and Travel	290	86		
Stationery	0	49		
Staff costs	16,051	16,539		
Fundraising	283	498		
Depreciation	3,404	1,367		
Room hire (Shantavira office)	1,840	0		
Other costs	82	137		
Prior Year correction	0	-596		
	26,403	26,286		

The Uddiyana Trust

Notes to the 2023 Statement of Financial Activities

6. Sangharakshita Complete Works Grant

This is a grant from Future Dharma Fund to support the Complete Works project.

7. Transfer from General Funds to Restricted Funds

In a decision dated 17/12/23 the trustees agreed that the TPL (Triratna Picture Library) and TVL (Triratna Video Library) restricted funds should be topped up from general funds to £10,200 and £10,900 respectively at the close of 2023.

8. Ugyen House expenditure

These costs include the rent charged by Adhithana for the Ugyen House annex which is maintained by Ugyen Sangharakshita Trust

9. Other project delivery

This category captures 90% of staff costs associated with the Digital Media Manager. 90% of this role is allocated to work directly fulfilling Charity objectives.

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

31 December 2023

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2023.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 12/08/2024

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address: 9 Linden Road, Hampton, TW12 2JG

Uddiyana Trust

England & Wales - Charity number 1046398

Accounts

AGM FOR URGYEN SANGHARAKSHITA TRUST (working name for UDDIYANA TRUST) - *Year ending 31 December 2022* The Annual General Meeting was held on 24 October 2023 Online at 19.30.

Members present: Andrew Goodman (Mahamati) (Chairman), Damon Peterson (Paramartha) (Treasurer), Matthew Webb (Amalavajra) (Secretary)

Apologies: Garry Pierpoint (Mokshapriya) (Trustee) Alex Kennedy (Subhuti) (Trustee retired 28.10.22, wishes to continue as a member) All members were informed of AGM.

1. Minutes of Previous meeting - The minutes of the delayed AGM for 2021 (due to illness of our accountant), held on 6 February 2023, were passed as correct.

2. Chairman's Report. This report covers the fourth full year of operation since the death of Sangharakshita on 30 October 2018. During this period the Trust continued with our major refocus in our activities in line with our revised objectives, to preserve the legacy of Ugyen Sangharakshita and to make the legacy in the various forms for which the Trust is responsible accessible to future generations.

During the period reported on here, the Trust saw the launch of a new Sangharakshita.org website with the first multimedia telling of Sangharakshita's life story in English, the launch of the Triratna Video Library making our video archives available far and wide, we produced video blogs and social media on Sangharakshita's life and teachings, and helped to finance Sangharakshita's Complete Works.

The Literary Executors were active during this period, working on behalf of our Trust, including the LE's co-ordinator, who receives some remuneration from the Trust, taking a key role with the International Triratna Translations Board.

Our work has been overseen by our Director Prajnaketu, working three days a week, taking up his appointment on 1 January 2022. His appointment makes a great difference to the effectiveness of our Trust. As well as taking forward the projects mentioned above, Prajnaketu had to give significant time to sorting out our financial management which had suffered due to the illness of Sarvapala in the previous year. This led to the recruitment of our new financial manager, Visarada, and thankfully all is now in order.

None of this would have been possible without the generosity of our donors. In November 2022 Prajnaketu and Suryanaga conducted a phone appeal to our existing donors to answer any questions and also to invite to increase their contributions if they wished. They reported that they were struck by the

positivity and generosity of the responses. The Trust also works closely with our institutional partners, FutureDharma Fund, Windhorse Publications, Dharmachakra, Adhithana, and many Buddhist centres, all of whom have contributed considerably to our meeting our objectives.

I would like to thank the impressive team who contributed so much to fulfilling the Trust's objectives in 2022: Mokshapriya, Suryanaga, Sarvapala, Shantavira and Kalyanaprabha. I would like to thank the Trustees and the Literary Executors for giving their time freely and for fulfilling their responsibilities with due diligence. I would particularly like to rejoice in Subhuti who retired as a Trustee in October 2022 having served as a Trustee since our founding in 1995, and who played a key role in our vision and governance on many occasions.

The Trustees accepted the Chair's report and a copy will be forwarded to the Charity Commission.

3. Treasurer's Report. The Treasurer presented the accounts for the year ended 31st December 2022, which are reported on by Annemie Philips, our independent examiner. The Trustees accepted the accounts and a copy will be forwarded to the Charity Commission.

4. Review of Membership: The following wish to continue as members of Triratna Buddhist Community (Uddiyana): Terence Pilchick (Nagabodhi), Alexander Kennedy (Subhuti), Andrew Goodman (Mahamati), Raymond Fricker (Sona), Ian Waddell (Dhammarati), Christina Robertson (Dayanandi), Colin Warren (Surata), Richard Hutton (Padmavajra), Robin Collett (Cittapala), Damon Peterson (Paramartha), Hugh Evans (Buddhadasa), Matthew Webb (Amalavajra), Alison Wray (Punyamala) and Garry Pierpoint (Mokshapriya).

It was noted that Michael Wharton (Ashvajit), a member for some years, had died in July 2023, so is removed from the list of members.

5. The following persons were proposed and accepted as Trustees: Garry Pierpoint (Mokshapriya) (proposed by Mahamati and seconded by Paramartha), Damon Peterson (Paramartha) (proposed by Mahamati and seconded by Amalavajra), Matthew Webb (proposed by Mahamati and seconded by Paramartha), Andrew Goodman (Mahamati) (proposed by Amalavajra and seconded by Paramartha).

Andrew Goodman, Chairman, The Urgyen Sangharakshita Trust (Uddiyana Trust) 24 October 2023

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

31 December 2022

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2022.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 14/10/2023

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address:

9 Linden Road, Hampton, TW12 2JG

The Uddiyana Trust
Annual Accounts 2022
Balance Sheet

	2022	2021	Notes
	£	£	
Fixed Assets	325,283	318,502	1
<u>Current Assets</u>			
Cash	88,946	88,957	2
Debtors	2,619	2,619	3
Total Assets	<u>416,848</u>	<u>410,078</u>	
<u>Liabilities</u>			
Current Liabilities	2,339	1,687	4
Creditors	4,974	0	5
Total Liabilities	7,313	1,687	
Total Net Assets	<u>409,535</u>	<u>408,391</u>	
<u>Represented by</u>			
General Accumulated Fund	395,943	398,994	
Restricted Funds	13,592	8,752	
Total Funds	<u>409,535</u>	<u>407,746</u>	

The Uddiyana Trust
Notes to the 2022 Balance Sheet

	2022	2021
1. Fixed Assets	£	£
Display cabinets	2,735	4,102
Artefacts and Library	314,400	314,400
Computer hardware	8,148	
Total fixed assets	325,283	318,502

Sangharakshita donated all his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance company at £314,400 which is the figure included in the balance sheet. Depreciation is not applied to these assets.

	2022	2021
2. Bank balances	£	£
Co-op current accounts	28,427	32,700
COIF support	52,820	52,309
PayPal	7,699	3,948
Total cash at bank	88,946	88,957

3. Debtors

Gift Aid due on donations for prior year	2,619	2,619
	2,619	2,619

4. Current Liabilities

Accrued expenses	450	225
Payroll liabilities	1,889	1462
	2,339	1,687

5. Creditors

Trade creditors	4,974	0
-----------------	-------	---

The Uddiyana Trust
2022 Depreciation schedule

Depreciation is calculated at 25% of cost	Total	Artefacts	Display cabinets	Computer hardware
Cost	327,756	314,400	5,208	8148.05
Accumulated depreciation to 2021	1,106	0	1,106	0
Charge for the year	1,367	0	1,367	0
Net book value	325,283	314,400	2,735	8,148

The approach to depreciating assets has been simplified to straight line over 4 years. with 3 years left for the Display cabinets the depreciation for 2022 is therefore calculated at 33.3% of the value at the start of 2022

Computer hardware acquired in 2022 has not been depreciated because it has not completed its first year of use

The Urgyen Sangharakshita Trust
Statement of Financial Activities 2022

	General Funds	Restricted	2022	2021	Notes
INCOMING RESOURCES	£	£			
Earned income	1,240		1,240	1,114	
Gifts and donations	52,879	1,253	54,132	46,017	
Bank Interest	510	0	510	6	
Gift Aid tax	2,626	0	2,626	2,619	
Grants		14,033	14,033		6
Other Income		0		10	
TOTAL INCOMING RESOURCES	<u>57,256</u>	<u>15,286</u>	<u>72,542</u>	<u>49,766</u>	
RESOURCES EXPENDED					
Charitable Expenditure					
Direct Charitable Expenditure	34,020	10,446	44,466	33,020	
Total Charitable Expenditure	34,020	10,446	44,466	33,020	
Charity Administration					
General Overheads	26,286		26,286	23,348	
Total Administrative Expenditure	26,286	0	26,286	23,348	
TOTAL RESOURCES EXPENDED	<u>60,307</u>	<u>10,446</u>	<u>70,752</u>	<u>56,368</u>	
NET INCOME/EXPENDITURE	<u>-3,051</u>	<u>4,840</u>	<u>1,789</u>	<u>-6,602</u>	
Reconciliation of funds					
Balance brought forward	398,994	8,752	407,746	414,347	
Balance carried forward	<u>395,943</u>	<u>13,592</u>	<u>409,535</u>	<u>407,745</u>	

The Uddiyana Trust
2022 Statement of Financial Activities - Expenditure Detail

Year ended 31 December 2022

	2022	2021	Notes
Charitable Expenditure			
<i>General Fund</i>			
Urgyen House	8,110	23,301	7
Literary Executors	3,800	3,412	
Other project delivery	22,110		8
<i>Restricted Funds</i>			
Triratna Picture Library	6,346	5,263	
Triratna Video Library	4,100	1,044	
	<u>44,466</u>	<u>33,020</u>	

General Administrative Expenditure

Bank Charges	448	85	
Accounting fees	225	225	
Insurance	4,457	4,032	
Software	2,054	755	
Websites	1,022	0	
Meetings and Travel	86	0	
Stationery	49	74	
Staff costs	16,539	11,987	
Fundraising	498	0	
Depreciation	1,367	1,106	
Room hire (Shantavira office)	0	844	
Office/Archive Room rent	0	3,600	9
Other costs	137	640	
Prior Year correction	-596		
	<u>26,286</u>	<u>23,348</u>	

The Uddiyana Trust
Notes to the 2022 Statement of Financial Activities

6. Triratna Video Library Grant

This is a grant from Future Dharma Fund.

7. Urgyen House site hire

The Charity pays Adhithana a fee of 300/month as Urgyen House is physically located on Adhithana's premises. This fee has been reclassified from 2022 as a Charitable Expense. Exhibitions are being run within Urgyen House and it is open to visitors. The expense is therefore part of directly fulfilling the Charity's objectives.

8. Other project delivery

This category captures 90% of staff costs associated with the Digital Media Manager. 90% of this role is allocated to work directly fulfilling Charity objectives.

9. Room hire (Urgyen House Annex)

See note (7)

Uddiyana Trust

England & Wales - Charity number 1046398

Accounts

AGM FOR URGYEN SANGHARAKSHITA TRUST (working name for UDDIYANA TRUST) - 2021

The Annual General Meeting was held on 6 February 2023, Zoom Online. Unfortunately the AGM was delayed due to illness of our accountant, until it was possible to finalise and have our accounts examined.

Members Present: Andrew Goodman (Mahamati) (Chairman), Damon Peterson (Paramartha) (Treasurer), Garry Pierpoint (Mokshapriya) (Trustee)

Apologies: Matthew Webb (Amalavajra) (Secretary)

All members were informed of AGM.

1. Minutes of Previous meeting - The minutes of the AGM for 2020, held on 27 September 2021, were passed as correct.

2. Chairman's Report. This report covers the third full year of operation since the death of Sangharakshita on 30 October 2018. During this period the Trust continued with a major refocus in our activities in line with our revised objectives, to preserve the legacy of Urgyen Sangharakshita and to make the legacy in the various forms for which the Trust is responsible accessible to future generations. As part of our refocus we registered with the Charity Commission a new Working name as Urgyen Sangharakshita Trust. During the year the conversion work of Urgyen House

continued until the opening in August 2021. In August 2021 at a large Order event at Adhithana Suryanaga, our full-time web and communications developer, presented a vision for a new sangharakshita.org which was enthusiastically received and about £22.5K was raised when estimated over one year's income.

Suryanaga had been working voluntarily on this project prior to his appointment, and was able to release the first phase of the website before the end of 2021. The Triratna Picture Archive was launched by Mokshapriya in September 2021. This project is jointly-funded with Future Dharma Fund. We are grateful to Future Dharma for this collaboration. Mokshapriya continued to produce regular video blogs through urgyenhouse.org. Significantly at the end of 2021 we were very pleased to appoint Prajnaketu as our first Director, working three days a week, taking up his appointment on 1 January 2022. We are grateful to our loyal and generous regular donors for their continued regular support. The Literary Executors were active during this period, working on behalf of our Trust, including in liaising with Windhorse Publications for publishing the remaining volumes of Sangharakshita's Complete Works. I would like to thank the impressive team who contributed so much to fulfilling the Trust's objectives in 2021: Mokshapriya, Suryanaga, Sarvapala, Shantavira and Kalyanaprabha. We welcomed Mokshapriya as a new Trustee at our meeting on 21 April 2022. I would like to thank the Trustees and the

Literary Executors for giving their time freely and for fulfilling their responsibilities with due diligence. The Trustees accepted the Chair's report and a copy will be forwarded to the Charity Commission.

3. Treasurer's Report. The Treasurer presented the accounts for the year ended 31st December 2021, which are reported on by Annemie Philips, our independent examiner. The Trustees accepted the accounts and a copy will be forwarded to the Charity Commission.

4. Review of Membership: The following wish to continue as members of Triratna Buddhist Community (Uddiyana): Terence Pilchick (Nagabodhi), Alexander Kennedy (Subhuti), Andrew Goodman (Mahamati), Raymond Fricker (Sona), Ian Waddell (Dhammarati), Christina Robertson (Dayanandi), Colin Warren (Surata), Richard Hutton (Padmavajra), Robin Collett (Cittapala), Damon Peterson (Paramartha), Michael Wharton (Ashvajit), Hugh Evans (Buddhadasa), Matthew Webb (Amalavajra), Alison Wray (Punyamala) and Garry Pierpoint (Mokshapriya).

5. The following persons were proposed and accepted as Trustees: Garry Pierpoint (Mokshapriya) (proposed by Mahamati and seconded by Paramartha), **Damon Peterson** (Paramartha) (proposed by Mahamati and seconded by Mokshapriya), **Matthew Webb** (proposed by

Mahamati and seconded by Mokshapriya), **Andrew Goodman** (Mahamati) (proposed by Mokshapriya and seconded by Paramartha).

*Andrew Goodman, Chairman, The Urgyen
Sangharakshita Trust (Uddiyana Trust) 6 February
2023*

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

2 February 2023

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2021.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 02/02/2023

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address:

9 Linden Road, Hampton, TW12 2JG

Uddiyana Trust (Charity No. 1046398)

Statement of Financial Activities Year Ended 31 December 2021

	Notes	Unrestricted General Fund £	Restricted £	2021 Total £	2020 Total £
INCOMING RESOURCES					
Earned income		1,114		1,114	0
Gifts and Donations		46,017		46,017	49,964
Bank Interest		6		6	130
Gift Aid Tax		2,619		2,619	2,583
Other income		10		10	161
TOTAL INCOMING RESOURCES		49,766	0	49,766	52,839
RESOURCES EXPENDED					
Charitable Expenditure	2				
Direct charitable expenditure		26,713	6,307	33,020	28,142
Total Charitable Expenditure		26,713	6,307	33,020	28,142
Administration					
<u>Charity Administration</u>	3				
General Overheads		23,348		23,348	12,024
Total Administrative Expenditure		23,348	0	23,348	12,024
TOTAL RESOURCES EXPENDED		50,061	6,307	56,368	40,166
Prior Year Adjustment				0	620
Surplus/ (Deficit)		(295)	(6,307)	(6,601)	13,293
Reconciliation of funds					
Balance brought forward		399,289	15,059	414,347	401,054
Balance carried forward		398,994	8,752	407,746	414,347

Uddiyana Trust (Charity No. 1046398)

Balance Sheet as at 31 December 2021

	Notes	2021 £	2020 £
Fixed Assets	4, 5	318,502	314,400
<i>Total Fixed Assets</i>		318,502	314,400
Current Assets			
Cash at Bank and in hand	1	88,958	100,202
Debtors	6	2,619	1,993
<i>Total Current Assets</i>		91,577	102,195
Total Assets		410,079	416,595
Liabilities			
Current liabilities		225	
Creditors	7	1,462	2,248
Total Liabilities		1,687	2,248
Total Assets less Liabilities		408,392	414,347
Represented By:			
General Accumulated Fund		398,994	399,289
Restricted fund: Image archive project		8,752	15,059
Total Funds		407,746	414,347

Signed

AM Goodman
Chair

Uddiyana Trust

Notes to the Accounts

Year ended 31 December 2021

	2021	2020
	£	£
1. Bank Balances		
C0-0P Current Current Accounts	32,700	46,195
COIF Support	52,309	52,303
PayPal	3,948	1,444
Petty Cash		260
	88,958	100,202
2. Charitable expenditure		
Urgyen House - Conversion costs	23,301	10,330
Dharmachakra	0	10,000
Image Archive project - Restricted	5,263	6,141
Video archive project - Restricted	1,044	
Literary Executors	3,412	1,000
Other		50
	33,020	27,521
3. General Administrative Expenditure		
Reference/Training	0	10
Payroll.Support	11,987	2,564
Shantavira BBC Office	844	825
Insurance	4,032	3,932
Accounting fees	225	200
IT inc software	755	761
Office/Archive Room Rent	3,600	3,600
Stationery	74	34
Bank Charges:PayPal charges	85	106
Sundry expenses	640	(7)
Depreciation	1,106	
Total	23,348	12,024
4. Fixed Assets		

Sangharakshita donated all of his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance Company at £314,400 which is the figure included in the Balance Sheet.

5. Depreciation schedule	Artefacts	Display Cabinets	Total
Cost	314,400	5,208	319,608
Depreciation	0	1,106	1,106
Net Book Value c/d from 2019	314,400	5,208	319,608
Net Book Value as at 31st december 2020	314,400	4,102	318,502

6. Debtors

Gift Aid tax recoverable on donations	2,619	2,583
HMRC Tax & NI overpaid	0	10
Refund to Triratna Chairs	0	(600)
Prior Year Adjustment		
	2,619	1,993

7. Creditors

Payroll liabilities	1,462	31
Accounts payable	0	3,017
Accruals Independent Examiner fee	225	200
Deferred income		(1,000)
	1,687	2,248

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

2 February 2023

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2021.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 02/02/2023

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address:

9 Linden Road, Hampton, TW12 2JG

Uddiyana Trust (Charity No. 1046398)

Statement of Financial Activities Year Ended 31 December 2021

	Notes	Unrestricted General Fund £	Restricted £	2021 Total £	2020 Total £
INCOMING RESOURCES					
Earned income		1,114		1,114	0
Gifts and Donations		46,017		46,017	49,964
Bank Interest		6		6	130
Gift Aid Tax		2,619		2,619	2,583
Other income		10		10	161
TOTAL INCOMING RESOURCES		49,766	0	49,766	52,839
RESOURCES EXPENDED					
Charitable Expenditure	2				
Direct charitable expenditure		26,713	6,307	33,020	28,142
Total Charitable Expenditure		26,713	6,307	33,020	28,142
Administration					
<u>Charity Administration</u>	3				
General Overheads		23,348		23,348	12,024
Total Administrative Expenditure		23,348	0	23,348	12,024
TOTAL RESOURCES EXPENDED		50,061	6,307	56,368	40,166
Prior Year Adjustment				0	620
Surplus/ (Deficit)		(295)	(6,307)	(6,601)	13,293
Reconciliation of funds					
Balance brought forward		399,289	15,059	414,347	401,054
Balance carried forward		398,994	8,752	407,746	414,347

Uddiyana Trust (Charity No. 1046398)

Balance Sheet as at 31 December 2021

	Notes	2021 £	2020 £
Fixed Assets	4, 5	318,502	314,400
<i>Total Fixed Assets</i>		318,502	314,400
Current Assets			
Cash at Bank and in hand	1	88,958	100,202
Debtors	6	2,619	1,993
<i>Total Current Assets</i>		91,577	102,195
Total Assets		410,079	416,595
Liabilities			
Current liabilities		225	
Creditors	7	1,462	2,248
Total Liabilities		1,687	2,248
Total Assets less Liabilities		408,392	414,347
<u>Represented By:</u>			
General Accumulated Fund		398,994	399,289
Restricted fund: Image archive project		8,752	15,059
Total Funds		407,746	414,347

Signed

AM Goodman
Chair

Uddiyana Trust

Notes to the Accounts

Year ended 31 December 2021

	2021	2020
	£	£
1. Bank Balances		
C0-0P Current Current Accounts	32,700	46,195
COIF Support	52,309	52,303
PayPal	3,948	1,444
Petty Cash		260
	88,958	100,202
2. Charitable expenditure		
Urgyen House - Conversion costs	23,301	10,330
Dharmachakra	0	10,000
Image Archive project - Restricted	5,263	6,141
Video archive project - Restricted	1,044	
Literary Executors	3,412	1,000
Other		50
	33,020	27,521
3. General Administrative Expenditure		
Reference/Training	0	10
Payroll.Support	11,987	2,564
Shantavira BBC Office	844	825
Insurance	4,032	3,932
Accounting fees	225	200
IT inc software	755	761
Office/Archive Room Rent	3,600	3,600
Stationery	74	34
Bank Charges:PayPal charges	85	106
Sundry expenses	640	(7)
Depreciation	1,106	
Total	23,348	12,024
4. Fixed Assets		

Sangharakshita donated all of his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance Company at £314,400 which is the figure included in the Balance Sheet.

5. Depreciation schedule	Artefacts	Display Cabinets	Total
Cost	314,400	5,208	319,608
Depreciation	0	1,106	1,106
Net Book Value c/d from 2019	314,400	5,208	319,608
Net Book Value as at 31st december 2020	314,400	4,102	318,502

6. Debtors

Gift Aid tax recoverable on donations	2,619	2,583
HMRC Tax & NI overpaid	0	10
Refund to Triratna Chairs	0	(600)
Prior Year Adjustment		
	2,619	1,993

7. Creditors

Payroll liabilities	1,462	31
Accounts payable	0	3,017
Accruals Independent Examiner fee	225	200
Deferred income		(1,000)
	1,687	2,248

Uddiyana Trust

England & Wales - Charity number 1046398

Accounts

AGM FOR URGYEN SANGHARAKSHITA TRUST (UDDIYANA TRUST) - 2020

The Annual General Meeting was held by Zoom on 27 September 2021 at 10.30 hours.

Members Present: Andrew Goodman (Mahamati) (Chairman), Damon Peterson (Paramartha) (Treasurer) Matthew Webb (Amalavajra) (Secretary), Alex Kennedy (Subhuti) (Trustee) *All members were informed of AGM.* **Invited:** Garry Pierpoint (Mokshapriya)

1. **Minutes of Previous meeting** - The minutes of the AGM for 2019, held on 23rd October 2020, were passed as correct.

2. **Chairman's Report.** This report covers the second full year of operation since the death of Sangharakshita on 30 October 2018. During this period the Trust continued with a major refocus in our activities in line with our revised objectives, to preserve the legacy of Ugyen Sangharakshita and to make the legacy in the various forms for which the Trust is responsible accessible to future generations. During the year the conversion work of Ugyen House continued until the opening in August 2021. The Trust was active in communications especially through monthly video blogs from mid-2020 and the launch around the same time of an impressive new website urgyenhouse.org. The preparation of the Triratna Picture Archive continued, finally being launched in September 2021. This project is jointly-funded with Future Dharma Fund, and during 2020 we also made a successful application to Future Dharma for our Triratna Video Archive, though work on this will not start until late 2021. We are very grateful to Future Dharma for this collaboration. Our regular donor base numbering somewhat over 200 remained stable with few drop outs and a few new donors, though there was no new fundraising campaign in 2020. We are very grateful to our loyal and generous regular donors for their continued regular support. We also received a large donation from one individual, we are very grateful to him as well as to Amalavajra for initiating a conversation which led to this. The Literary Executors were very active during this period, working on behalf of our Trust. This included drawing up a detailed and important contract between the Trust and Windhorse Publications covering different aspects of future publishing of Sangharakshita's written work - this contract was signed on 21 August

2020. In September 2020 Clear Vision Trust was wound up and the remaining bank balance along with material assets transferred to us - although it was sad to see the closure, for our Trust the transfer was serendipitous especially because Mokshapriya, the founder of Clear Vision, has been with us to ensure that the precious photo and video archives are properly looked after, now under our aegis. I would like to thank the impressive team who have made all of this work possible: Mokshapriya, Shantavira and Sarvapala, as well as all those who have contributed to the work of the Trust on a voluntary basis. Finally and importantly, I would like to thank the Trustees for giving their time freely and for fulfilling their responsibilities with due diligence. The Trustees accepted the Chairs report and a copy will be forwarded to the Charity Commission.

3. Treasurer's Report. The Treasurer presented the accounts for the year ended 31st December 2020, which are reported on by Annemie Philips, our independent examiner. The Trustees accepted the accounts and a copy will be forwarded to the Charity Commission.

4. Review of Membership: The following wish to continue as members of Triratna Buddhist Community (Uddiyana): Terence Pilchick (Nagabodhi), Alexander Kennedy (Subhuti), Andrew Goodman (Mahamati), Raymond Fricker (Sona), Ian Waddell (Dhammarati), Christina Robertson (Dayanandi), Colin Warren (Surata), Richard Hutton (Padmavajra), Robin Collett (Cittapala), Damon Peterson (Paramartha), Michael Wharton (Ashvajit), Hugh Evans (Buddhadasa), Matthew Webb (Amalavajra), and Alison Wray (Punyamala). Vincent Flos (Sanghadasa) informed by email that he no longer wishes to be a member and sends his best wishes for the Trust and the AGM. The members present proposed that Garry Pierpoint (Mokshapriya) become a member, which he accepted.

5. The following persons were proposed and accepted as Trustees: Alexander Kennedy (Subhuti) and Matthew Webb (Amalavajra) (proposed by Mahamati and seconded by Paramartha), Damon Peterson (Paramartha) (proposed by Mahamati and seconded by Amalavajra), Andrew Goodman (Mahamati) (proposed by Paramartha and seconded by Amalavajra).

*Andrew Goodman, Chairman, The Ugyen Sangharakshita Trust
(Uddiyana Trust) 27th September 2021*

Uddiyana Trust Charity Number 1046398

ANNUAL REPORT AND FINANCIAL STATEMENTS 2020

CHARITY DETAILS

Name: Uddiyana Trust

Registration no.: 1046398

REGISTERED ADDRESS

Adhithana

Coddington

Ledbury

HR8 1JL

TRUSTEES

Andrew Michael Goodman (Mahamati) Chair

Damon Peterson (Paramartha) Treasurer

Alexander Charles Kennedy (Subhuti)

Matthew James Webb (Amalavajra) Secretary

INDEPENDENT EXAMINER

Annemie Philips ACCA (Dh. Satyapara)

BANKERS

*The Co-Operative Bank

34/38 High Street

Solihull B91 3TB

*CCLA

Senator House

86 Queen Victoria Street

London EC4V 4ET

Uddiyana Trust (Charity No. 1046398)

Balance Sheet as at 31 December 2020

	Notes	2020 £	2019 £
Fixed Assets	4	314,400	314,400
<i>Total Fixed Assets</i>		314,400	314,400
Current Assets			
Cash at Bank and in hand	1	100,202	65,845
Debtors	6	1,993	5,376
<i>Total Current Assets</i>		102,196	71,221
Total Assets		<u>416,596</u>	<u>385,621</u>
Liabilities			
Current liabilities			(439)
Creditors	7	2,248	50
Total Liabilities		<u>2,248</u>	<u>(389)</u>
Total Assets less Liabilities		<u><u>414,347</u></u>	<u><u>386,010</u></u>
<u>Represented By:</u>			
General Accumulated Fund		399,289	386,010
Restricted fund: Image archive project		15,059	
Total Funds		414,348	386,010

Signed

AM Goodman
Chair

Uddiyana Trust (Charity No. 1046398)

Statement of Financial Activities Year Ended 31 December 2020

	Notes	Unrestricted General Fund £	Restricted £	2020 Total £	2019 Total £
INCOMING RESOURCES					
Gifts and Donations		28,764	21,200	49,964	62,862
Bank Interest		130		130	295
Gift Aid Tax		2,583		2,583	3,524
Other income		161		161	1
TOTAL INCOMING RESOURCES		31,639	21,200	52,839	66,682
RESOURCES EXPENDED					
Charitable Expenditure					
Direct charitable expenditure	2	21,380	6,141	27,521	39,473
Total Charitable Expenditure		21,380	6,141	27,521	39,473
Administration					
<u>Charity Administration</u>					
General Overheads	3	12,024		12,024	12,165
Total Administrative Expenditure		12,024	0	12,024	12,165
TOTAL RESOURCES EXPENDED		33,404	6,141	39,545	51,638
Surplus/ (Deficit)		(1,765)	15,059	13,294	15,044
Reconciliation of funds					
Balance brought forward				401,054	386,010
Balance carried forward				414,348	401,054

Uddiyana Trust

Notes to the Accounts

Year ended 31 December 2020

	2020	2019
	£	£
1. Bank Balances		
Co-op Current Accounts	46,195	30,737
COIF Support	52,303	52,166
PayPal	1,444	1,278
Petty Cash	260	260
	100,202	84,441
2. Charitable expenditure		
Urgyen House - Conversion costs	10,330	363
Dharmachakra	10,000	5,000
Image Archive project - Restricted	6,141	6,067
Literary Executors	1,000	0
Ex-gratia	50	0
Sangharakshita's legacy disbursement	0	18,455
TPCT - 50% of Bhante film	0	750
Carers - Suvajra 6m and Sanghadasa part-year	0	5,402
Secretary - Sthanasraddha	0	3,437
	27,521	39,473
	21,380	
3. General Administrative Expenditure		
Reference/Training	10	0
Payroll.Support	2,564	2,659
Shantavira BBC Office	825	
Insurance	3,932	3,827
Legal Fees	200	200
IT inc software	761	618
Office/Archive Room Rent	3,600	4,369
Stationery	34	132
Bank Charges:PayPal charges	106	176
Sundry expenses	(7)	
Telephone	0	156
Travel & car	0	29
Total	12,024	12,165
4. Fixed Assets		

Sangharakshita donated all of his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance Company at £314,400 which is the figure included in the Balance Sheet.

5. Depreciation schedule

	Artefacts	
Cost	314,400	314,400
Depreciation	0	0
Net Book Value c/d from 2019	314,400	314,400
Net Book Value as at 31st december 2020	314,400	314,400

6. Debtors

Gift Aid tax recoverable on donations	2,583	3,524
HMRC Tax & NI overpaid	10	10
Refund to Triratna Chairs	(600)	(600)
	1,993	2,934

7. Creditors

Payroll liabilities	31	31
Accounts payable	3,017	
Accruals	200	
Deferred income	(1,000)	
	2,248	31

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

31 December 2020

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2021.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 26/08/2021

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address: 3 Oak Tree Avenue, Cambridge CB4 1AZ

Uddiyana Trust Charity Number 1046398

ANNUAL REPORT AND FINANCIAL STATEMENTS 2020

CHARITY DETAILS

Name: Uddiyana Trust

Registration no.: 1046398

REGISTERED ADDRESS

Adhithana
Coddington
Ledbury
HR8 1JL

TRUSTEES

Andrew Michael Goodman (Mahamati)	Chair
Damon Peterson (Paramartha)	Treasurer
Alexander Charles Kennedy (Subhuti)	
Matthew James Webb (Amalavajra)	Secretary

INDEPENDENT EXAMINER

Annemie Philips ACCA (Dh. Satyapara)

BANKERS

*The Co-Operative Bank

34/38 High Street

Solihull B91 3TB

*CCLA

Senator House

86 Queen Victoria Street

London EC4V 4ET

Uddiyana Trust (Charity No. 1046398)

Balance Sheet as at 31 December 2020

	Notes	2020 £	2019 £
Fixed Assets	4	314,400	314,400
Total Fixed Assets		314,400	314,400
Current Assets			
Cash at Bank and in hand	1	100,202	65,845
Debtors	6	1,993	5,376
Total Current Assets		102,196	71,221
Total Assets		416,596	385,621
Liabilities			
Current liabilities			(439)
Creditors	7	2,248	50
Total Liabilities		2,248	(389)
Total Assets less Liabilities		414,347	386,010
Represented By:			
General Accumulated Fund		399,289	386,010
Restricted fund: Image archive project		15,059	
Total Funds		414,348	386,010

Signed

AM Goodman
Chair

Uddiyana Trust (Charity No. 1046398)

Statement of Financial Activities Year Ended 31 December 2020

	Notes	Unrestricted General Fund £	Restricted £	2020 Total £	2019 Total £
INCOMING RESOURCES					
Gifts and Donations		28,764	21,200	49,964	62,862
Bank Interest		130		130	295
Gift Aid Tax		2,583		2,583	3,524
Other income		161		161	1
TOTAL INCOMING RESOURCES		31,639	21,200	52,839	66,682
RESOURCES EXPENDED					
Charitable Expenditure					
Direct charitable expenditure	2	21,380	6,141	27,521	39,473
Total Charitable Expenditure		21,380	6,141	27,521	39,473
Administration					
<u>Charity Administration</u>					
General Overheads	3	12,024		12,024	12,165
Total Administrative Expenditure		12,024	0	12,024	12,165
TOTAL RESOURCES EXPENDED		33,404	6,141	39,545	51,638
Surplus/ (Deficit)		(1,765)	15,059	13,294	15,044
Reconciliation of funds					
Balance brought forward				401,054	386,010
Balance carried forward				414,348	401,054

Uddiyana Trust

Notes to the Accounts

Year ended 31 December 2020

	2020	2019
	£	£
1. Bank Balances		
Co-op Current Accounts	46,195	30,737
COIF Support	52,303	52,166
PayPal	1,444	1,278
Petty Cash	260	260
	100,202	84,441
2. Charitable expenditure		
Urgyen House - Conversion costs	10,330	363
Dharmachakra	10,000	5,000
Image Archive project - Restricted	6,141	6,067
Literary Executors	1,000	0
Ex-gratia	50	0
Sangharakshita's legacy disbursement	0	18,455
TPCT - 50% of Bhante film	0	750
Carers - Suvajra 6m and Sanghadasa part-year	0	5,402
Secretary - Sthanasraddha	0	3,437
	27,521	39,473
	21,380	
3. General Administrative Expenditure		
Reference/Training	10	0
Payroll.Support	2,564	2,659
Shantavira BBC Office	825	
Insurance	3,932	3,827
Legal Fees	200	200
IT inc software	761	618
Office/Archive Room Rent	3,600	4,369
Stationery	34	132
Bank Charges:PayPal charges	106	176
Sundry expenses	(7)	
Telephone	0	156
Travel & car	0	29
Total	12,024	12,165
4. Fixed Assets		

Sangharakshita donated all of his books and artefacts to the Charity by a letter to the Trustees dated 25th May 2005. These were valued by the Insurance Company at £314,400 which is the figure included in the Balance Sheet.

5. Depreciation schedule

	Artefacts	
Cost	314,400	314,400
Depreciation	0	0
Net Book Value c/d from 2019	314,400	314,400
Net Book Value as at 31st december 2020	314,400	314,400

6. Debtors

Gift Aid tax recoverable on donations	2,583	3,524
HMRC Tax & NI overpaid	10	10
Refund to Triratna Chairs	(600)	(600)
	1,993	2,934

7. Creditors

Payroll liabilities	31	31
Accounts payable	3,017	
Accruals	200	
Deferred income	(1,000)	
	2,248	31

Independent Examiner's Report

Report to the trustees of

Uddiyana Trust

Accounts for year ended

31 December 2020

Charity no

1046398

I report to the trustees on my examination of the accounts of the above charity for the year ended 31 December 2021.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: Annemie Philips

Date: 26/08/2021

Name: Annemie Philips (Satyapara)

Relevant professional qualification(s) or body:

Association of Certified Chartered Accountants.

Address: 3 Oak Tree Avenue, Cambridge CB4 1AZ