

Tariki Trust Annual Report 2022

Part 1 Reference and Administrative details

Tariki Trust, Pinkerton Cottage, 34 Temple, Midlothian EH23 4SQ

Charity Registration number: 1149658

Tariki Trust trustees at 31 December 2022 were Paul Burt (chair), Elise Tate and Hussam Al-Nawab.

Day to day management of Tariki Trust is delegated to Caroline Brazier and Debbie Swain as Officers of the Trust.

Bankers:

National Westminster Bank PLC
7 Hinckley Road
Leicester
LE3 0TQ

Independent Examiner:

Caroline Sanderson
11 Little Road
Edinburgh
EH16 6SH

Part 2 Structure, Governance and Management

- a) Tariki Trust is a charitable trust no. 1149658 and is governed by a Deed of Trust which was signed in December 2011.

New Trustees

New trustees are appointed in accordance with the terms set out in the Tariki Trust Deed by invitation of the existing trustee group in consultation with the trust's officer(s). Trustees undergo an induction process and are supported by the existing trustees and officers in learning about the trust's activities and policies. Throughout the year 2021 Paul Burt remained chairperson of the trust. There were several changes in the trustee group. Trish Hibbert resigned in July 2022 due to ill health and Hussam Al-Nawab was appointed in March 2022. Julia Samworth was also approved to become a new trustee, and is to join the board in January 2023.

Trustee Training

Specific training is offered to the trustee group as appropriate to bring better understanding of issues affecting the trust. New trustees are given a welcome letter and are made aware of the structures and activities of the trust.

Decision Making

Policies and major decisions are made at trustee meetings which occur every few months and not less than two per year. Other decisions are made by the officers of the trust, acting on the trust's behalf, or by others to whom specific decision-making power is delegated. Any decision involving expenditure of more than £500 on a single item will be made in consultation with the trustees, and all significant decisions are normally discussed with one or more trustees. Officers currently submit a written report to each trustee meeting.

Identified Risks

The trustees of Tariki Trust identified the following risks:

- loss of income from reduced number of students.
- The trust being sued in the case of accident or professional misconduct.
- Injury or incapacity of Stephen McCabe who carries main responsibility for the Tariki Ecotherapy Training Programme and other key staff members.

Risk Reduction Strategies

For the above risks, Tariki Trust has set in place:

- **Loss of students:** The trustees agreed to continue to retain a financial buffer of at least £20,000 or six months' expenditure so that teaching obligations and other ongoing financial responsibilities can be met.
- **Tariki Trust being sued:** the trust has in place safeguarding policies and has professional and public liability insurance policies. It also has trustee liability cover.
- **The Course Leader being unable to fulfil his duties:** Tariki Trust carries a financial buffer which would allow teaching staff to be paid to cover extra classes and the duties which Stephen McCabe currently undertakes. The trustees ensure that access to websites and online platforms is held by more than one person and that passwords are stored securely in more than one place.

Part 3 Objectives and Activities

a) Objectives of charity from governing document

The trustees shall hold the trust fund and its income upon trust to apply them for the advancement of the Buddhist religion (Dharma).

In furtherance of the objects, but not otherwise, the trustees may exercise any of the following powers:

- To further the integration of Buddhist and Western understanding and wisdom by wide ranging study, research and education.
- To further the development of Buddhist culture, Buddhist psychology, and Buddhist psychotherapy, appropriate to the contemporary world.
- To support Dharma practitioners and Dharma students.
- To sponsor the training of individuals in the spiritual, psychological and practical skills necessary to actualise the principles of compassion, wisdom and skilful means in the context of contemporary society.
- To actualise Dharma practice by providing resources to those engaged in the relief of physical, ecological or psychological suffering, including the establishment of social, psychological, pastoral and spiritual services.

Psychotherapy Course Programmes

The psychotherapy training programme ceased teaching in June 2021, however a number of students remained enrolled as they still needed to complete their placements which had been disrupted during the Covid pandemic. These were finished and seven completion meetings were held during 2022 with the last students receiving the Diploma in Counselling in November 2022.

Ten Directions Ecotherapy Training Programme

The ecotherapy programme continued to be offered throughout 2022 in the online-based format devised in previous years. The training involves the completion of five online units plus 90 hours of attendance at online seminars and workshops offered over Zoom (or occasionally at in-person UK events). Each of the core units was accompanied by a one-day workshop on Zoom conducted by core staff, and other seminars and workshops were conducted by a wider range of people, some of whom had trained on the course in previous years and some of whom had specific areas of expertise. Online courses and seminars proved popular and the number of students remained high with over 20 students enrolled in 2021/22 and beyond. The seminars and workshops also attracted a following of people who did not enrol for the full programme, meaning that most individual seminars continue to attract 5-15 people – less than last year, where the numbers averaged 10-20. From researching this issue online, and speaking with other providers of online events, it appears that this is a global trend since the pandemic; people are generally more keen to meet in-person for recreational events than go to one-off online events.

We have, however, noticed another interesting trend in 2022: whilst the number of people attending individual workshops has been lower this year than last year, we have received a record number of applications for the 2023 full-year Certificate programme. It appears that whilst people are not as willing to spend recreational time in short online events, more people than ever perhaps feel encouraged to invest in our longer training programmes. We feel this is down to global trends and also the reach of our website: we are now one of the top-ranking websites in the world on search engines for ecotherapy training.

The core staff team continues to be Elise Tate, Fairlie Winship, Paul Maiteny, Harriet Sams and Sam Lewis with Caroline Brazier and Stephen McCabe. Stephen continues in the role of Course Director for the Certificate programme, running the online learning units as well as the day to day running of the course. Caroline looks after the Year Two Diploma.

By using Eventbrite to advertise and manage our event bookings, we have attracted almost 800 'followers' on the platform – double last year's numbers – which is allowing us to reach new people. Our online workshops and seminars continue to be attended by people from all over the world. We have recently received very encouraging feedback from our 2022 students (some of which are copied and pasted below), which continues to demonstrate that the move to become a (mostly) online course has been a transformational experience for many.

"I had no real idea of what it would bring, but I have been blown away by the depth but also the subtlety of the teachings. I don't know how you could improve it. I loved the way it was delivered. A balance of seminars and exercises. I think it flows beautifully."

"I am considering creating some kind of group work, which awaken people's connection, creativity and compassion towards self and the world. Need to think about it. But for sure I will utilise this. And I have gained some kind of peace. I do not have to try so hard, everything will work out as it is supposed to and I have so many ideas cooking. I want to browse through the exercises and some parts of the writings, too, to remember and apply into something new I will create. I have so much enjoyed the non-judgmental, non-achievement-based way of teaching and learning and loved your insights, Stephen. Thank you so much."

"In my personal life, I am already reducing my consumption, reusing and recycling more. In my work, I am about to announce an online workshop series based on some of the learning I've taken from the course, based on connecting to our sense of place. The support has been absolutely brilliant throughout this time. I felt Stephen's presence, support and meaningful reflections were always motivating and encouraging. I know I will need to go over some of the reading and tasks again in order to let them land fully, as there was so much to take in throughout the 5 units. The tasks with less reading often felt like a welcome break!"

"It offered more than I expected. I really enjoyed it and would recommend it to others. Getting to work with like-minded people from across the globe has been inspiring. Also, the variety and creativity of experiences has helped to expand my own imagination for all that can be done with Ecotherapy."

We offered around 250 hours-worth of workshops for our students to choose their 90 training hours from this year. This means that the course is flexible, where people develop their skills based on their personal interests. We also hosted two in-person training weekends in the UK (Whitley Bay and Midlothian) and we have several more in-person events in the diary for the coming year. This gives those in the UK an option to do some of their training in-person, although this will remain optional so that we can continue to attract an international student group who can do the training fully online.

It may be the case that if the public continues to attend fewer online events, it may not be viable to offer so many different online events to our Ten Directions students. We are reviewing this situation as the year goes on.

Ten Directions Diploma in Ecotherapy: for several years we have been offering a second year of training for students who had taken Ten Directions and wanted mentoring and support to develop their ecotherapy practice. In 2021 we began to offer a more structured second year programme to meet the needs of those who had trained under the new online format. This programme was designed to be flexible and consisted of monthly gatherings attended by all students, a project supported by a mentoring process, and 90 hours of attendance. In 2022, in recognition of the increased status of this second year programme, we decided to confine it to students who wanted to do the full programme and relaunch it as a Diploma Programme, adding a professional studies unit to the requirements. Caroline co-ordinated the year and facilitated the monthly sessions. Other staff offered mentoring. In September 2022 we had two new students enrolling on the programme whilst some student from 2021/22 were still completing their projects.

Free Events

We continue to offer free 'Monthly Wellbeing Event' online, which are open for anybody to attend. These sessions offer people different activities which support their emotional wellbeing (such as guided meditations). We also host a number of free and donation-based workshops based on Buddhist teachings.

Introduction to Buddhist Psychology and Other-Centred Approach

In Autumn Caroline offered a series of five introductory workshops on Buddhist psychology. The workshops were three hour teaching sessions, covering basic theory and were well attended. These are to be followed by six workshops on Other-Centred Approach in spring 2023.

Buddhism Classes continued to be offered online twice a month throughout 2022. One of the monthly classes focused on study. In the early part of the year we completed our examination of The Shoshinge Wasan, key texts in the Jodo Shinshu tradition. We then began a teaching series on The Twelve Lights of Amida comparing texts by Tan Luan, Shinran and Ippen. These were led by Enrique Galvan-Alvarez and Caroline. These classes alternated with chanting classes in which we learned and practiced chanting of the Shoshinge and the Shoshinge Wasan.

Other Involvement with Jodo Shinshu

In 2022 Caroline continued to attend online gatherings of Jodo Shinshu ministers and practitioners from the UK and elsewhere and to be involved with the wider sangha.

Psychotherapy

Caroline continues to work with a small number of ongoing clients on Zoom and also has a number of supervisees. The training agency which was established in 2021 to offer placements to students on the psychotherapy training programme also continued to operate throughout 2022 and, as students completed their studies, became a counselling service, operating within Tariki Trust and organised by a team of graduates headed by Claire Wirsig. The report from this service follows.

Tariki Counselling Service Report 2022-23

This past year has seen a transition in the Tariki Counselling service as it shifted from a placement agency for students earning their Counselling Diplomas to a collective of therapists in private practice, unified by a Buddhist approach to therapy. In March 2022, there were five student counsellors and one fully qualified counsellor seeing between 3 – 10 clients each through this service. Both student and qualified counsellors saw clients on a voluntary basis. The service received feedback from clients regarding their experience of the therapy provided:

- *Client 1 (who had nearly two years of therapy with the service): I could never afford long-term therapy and I tried everywhere to get free therapy but there wasn't anything available, only a few sessions. I'm just so grateful to have had this opportunity and also proud of myself for making the most of it.*
- *Client 2: Therapy has allowed me to go through my difficult childhood and to see the damage it has caused me and my life. Although it has been really difficult at times I feel like I have processed so much stuff. Being heard and being able to be myself has been really freeing. I see myself in a much kinder way; I didn't release how hard on myself I was. I can only describe it as feeling lighter. I am starting to build a more positive life now.*
- *Client 3: As a Buddhist it was nice to have a therapist that could understand my practice and I didn't have to repeatedly explain this important part of my life.*

The service collected feedback from counsellors as well, with respect to their experience as students on placement:

- *In the last year I completed the counselling diploma and I feel very fortunate that I got to see a wide spectrum of clients including different presenting issues, ages, cultures, religious / spiritual backgrounds, and sexual orientations.*
- *I had the experience of delivering both short and long-term therapy as well as the various challenges that therapists have to face; helping my learning process greatly.*
- *It was great to be on a placement where the Buddhist approach could be explicit.*

As the student counsellors qualified between March – November 2022, they allowed their voluntary client work to reach a natural ending, and the service began advertising itself as a collective of fully qualified practitioners. Alongside these changes, the majority of the counsellors began seeking employment and/or developing their own private practices as qualified professionals.

The Tariki Counselling Service continues to offer online therapy from a Buddhist perspective, with variable rates for sessions dependent on the practitioner. The therapists in this group meet every other month to support one another, share ideas, and discuss practical issues. We are in the process of exploring how we promote ourselves as a collective of practitioners, each with our own individual styles and yet united by our Buddhist underpinning. We look forward to seeing what the next phase of our journey holds.

GDPR compliance and other policies

In 2018 with the introduction of GDPR legislation, Tariki Trust reviewed its data handling and adopted new policies as a result. At the same time, the officers and trustees worked together on a major review of all policy documents of the trust. These policies have continued to be reviewed in line with the requirements established by the trustee group.

Use of volunteers

Tariki Trust has no salaried staff. Teaching staff and other presenters receive honoraria or sessional fees in appreciation of this work. These are generally lower than 'market rate' and sometimes substantially so. Much of our work is therefore done on a voluntary or semi-voluntary basis.

Part 4 Achievements and Performance

Although some of our online events were attended in fewer numbers than last year, we have also received 35 applications for next year's training, and are likely to receive more by the time the course starts. This may mean that, for the first time, the online units will be so busy that they will need more than one member of staff to support their delivery. If it comes to this, Stephen will be supported by the wider staff team, in particular Sam and Harriet.

Our staff team continues to engage in a collaborative approach to decision making.

Our in-person events in the UK went very well; both events attracted small numbers but it was commented by several that having the opportunity to train in-person really made a difference for them. At least one person is about to apply for the year-long training after coming along to an in-person event.

Tariki Trust continues to provide training and services, particularly in the fields of Buddhist psychology and ecotherapy. The Ten Directions course programme is now being supported by a staff group who are dispersed all over the UK, with guest tutors in Japan, USA and Finland. Our student reach is truly international with this year's students coming from Spain, USA, Belgium, Mexico, Germany, UK and Finland.

Tariki Trust also continues to offer and support Buddhist practice through online teaching. As a Buddhist priest, Caroline continues to lead Buddhist activities alongside other priests from the Jodo Shinshu community. The Tariki programmes continue to offer a distinctly Buddhist model of therapy both to its students and to others working in therapeutic fields, continuing to contribute to the field of knowledge of Buddhist psychology, psychotherapy and environmentally based working.

We have offered around 15 free online wellbeing events for people who are not able to afford our paid events. These sessions have covered offered meditation, storytelling therapy, yoga and more.

Part 5 Financial Review

2022 was a year in which Tariki Trust maintained a steady course under its new operational structure, both in its finances and in its delivery of services. Income during the year was very similar to 2021 (£45,500 in 2022 as opposed to £46,800 in 2021). Despite this slight reduction in income, because overall expenditure was lower (£34,600 in 2022 as opposed to £45,100 in 2021), the total funds held at the end of 2022 were substantially greater than those held at the end of 2021 (£97,100 in 2022 as opposed to £86,200). The healthy balance reflects the prudent approach which has been taken during the transitional period following the closure of the psychotherapy training programme and the ending of operations at the Buddhist House and shows that the new regime is operating successfully in a way that is financially stable.

In terms of income, the major part of that taken in 2022 once again came from student fees. At £44,000, this was a remarkably similar amount to that taken in income from student fees in 2021. These fees made up the bulk of income in 2022, whereas in 2021 there was still a modest income which came largely from dispersal of items from The Buddhist House. Income from Caroline's therapeutic work also reduced greatly in 2022 compared to 2021, reflecting her changing work pattern. (£330 in 2022 as opposed to £1445 in 2021) There was also a small gain of just under £600 which came from the transfer of funds which had been held in euros into Tariki Trust's sterling account.

Expenditure was lower overall than in previous years with several expenditure headings largely disappearing. Catering was limited to a couple of attendance-based events, and travel expenses to the reimbursement of petrol costs for attending Buddhafield and a couple of other Tariki-related events. A

number of small categories of expenditure disappeared altogether. The budget for training was very much reduced as were insurance payments as some of these previously related to The Buddhist House.

Computer costs included the purchase of a new laptop for Debbie who continues to have a strong role in supporting the trust through bookkeeping, accounts and trustee administration. Internet costs increased to £3,300 in 2022 from £900 in 2021 reflecting our increasing reliance on online platforms.

Officers' allowances were substantially lower in 2022 than in the past (£2,700 in 2022 as opposed to £15,500 in 2021). This is partly because the nature of the officers' roles have changed with Caroline and Debbie's semi-retirement and the closure of the psychotherapy programme and The Buddhist House, but also Stephen is largely remunerated on the same sessional basis for teaching as other staff so that the proportion of his work to be covered by a separate fee is smaller. Taking account of the healthy balance of income to expenditure in 2022, the trustees are in the process of reviewing remuneration given to staff for administrative, technical, management and other supporting roles so officers' allowances will increase in 2023. Other staff costs covered sessional teaching. These increased in 2022 to £25,000 as opposed to £19,000 in 2021, reflecting an increase in the number of hours of course provision offered, and also a modest increase in the rates paid to staff for teaching to reflect changes in the cost of living.

The item listed under sacristy (£200) was an honorarium paid to Enrique in respect of teaching which he has done this year and directly reflects dana (donations) received for his classes.

Overall, we can see that 2022 was a very successful year for Tariki Trust, financially and in other respects. As an organization, we are aware that our changing responsibilities mean that the level of funds held in our bank accounts are in excess of what is needed. We have therefore, for some time, been looking into the possible purchase of a piece of land on which we can conduct ecotherapy events. So far, a suitable place has not come onto the market, but the Tariki trustees have agreed to support such a venture should such a place become available.

As we go forward into 2023, we are confident that, by reflecting current trends in environmentally based education and in engaged Buddhism, we will continue to offer a quality service to our students, participants and all who use our services whilst maintaining financial prudence.

Part 6 Plans for the Coming Year and Beyond

2022 was the third year in which we ran an (almost) fully-online ecotherapy training system which we started to develop during the pandemic. Since then, we have created many new systems such as using slicker platforms like Eventbrite and Mighty Networks for the delivery of our online courses. We believe that we have established a system that really works and as such, next year we will continue to tweak this rather than reinventing anything.

Our aims for next year are:

- To continue running the Ten Directions Certificate and Diploma courses in largely the same format as we did in 2021, yet responding to the changing landscape of online learning as the year goes on.
- To work on new ways of promoting our online events in light of them not being as popular this year. This will include (in 2023) hosting some events in partnership with the extremely popular 'Online Events' CPD platform as well as exploring other avenues on social media.
- To respond to our record number of Ten Directions applications by having more than one member of staff supporting the students in the online forum for the Ten Directions Certificate.
- To work with the staff group to develop the Ten Directions programme further and offer related

short courses and events within a learning community model

- To continue to recruit people onto our mailing list, which now has almost 1300 signups (up by about 300 in the last year).
- To continue to offer courses as part of the ecotherapy programme through online seminars and workshops which will appeal not only to enrolled students but also to other interested parties.
- To offer several in-person attendance-based ecotherapy events in Scotland, and possibly other areas of the UK.
- To foster systems of communication between the ecotherapy staff team and the trustees
- To offer Buddhist teaching and practice online
- To review and establish firm financial and managerial systems so that the organisation continues on a solid basis
- To continue to deliver events related to Buddhist psychology, psychotherapy and Buddhist practice, as we did this year with our 'Other Centred Therapy' and 'Buddhist Psychology' series.
- To foster our links with Jodo Shinshu and other Buddhist traditions.
- To explore investing in our own land in the Scottish Borders which we can use for in-person camping retreats.

Tariki Trust Accounts for the Year Ended 31 December 2022
Statement of Financial Activity

	Note	2022	2021
Incoming Resources			
Voluntary Income: Donations	1	454.00	722.53
From Charitable Activities	2	45,070.67	46,164.45
Total Incoming Resources		45,524.67	46,886.98
Resources Expended			
Cost of Generating Funds	3		
Charitable Activities	4	34,609.14	45,110.72
Governance Costs	5		
Total Resources Expended		34,609.14	45,110.72
Net Incoming Resources		10,915.53	1,776.26
less Major Building Expenses	11		2,295.00
Net Movement in Funds		10,915.53	(518.74)
General Funds: Balance brought forward		86,279.58	86,798.32
Total Funds Carried Forward		97,195.11	86,279.58
Represented By:			
Current Assets			
Cash and Bank	8	97,195.11	86,279.58
Total Assets		97,195.11	86,279.58

Notes Forming part of the Statement of Financial Activity
for the Year to 31 December 2022

	2022 £	2021 £
1	Donations consists of	
	Donations	722.53
	Start up Grants	0.00
	<u>454.00</u>	<u>722.53</u>
2	Charitable Activities Income	
	Student Fees	43,912.05
	Postage and stationary	19.79
	Counselling and Supervision	1,445.00
	External events	20.00
	Sales of Books	206.38
	Other Income	561.23
	Revaluation Profit	-
	<u>584.85</u>	<u>-</u>
	<u>45,070.67</u>	<u>46,164.45</u>
3	There were no appeals or fund-raising events in the year.	
4	Charitable Activities	
	Food and Consumables	76.66
	Utilities	1,938.14
	Travel and Subsistence	
	Motor Running Expenses	623.99
	Other Travel and in transit Accommodation	-
	Office and Admin costs	
	Printing postage and stationery and bank charges	359.68
	Exchange differences	-
	Computer running	60.99
	Phone and internet	960.07
	Officer's Allowance	15,500.00
	Insurance	1,580.99
	House and Garden	1,299.46
	Vets	-
	Course Costs & Training	
	- staff costs	19,881.83
	- supervision and training (courses, conferences and festivals)	2,006.01
	-subscriptions	-
	- books, equipment etc.	37.99
	Buddhist outreach, networking and Sacristy	
	- Chaplaincy expenses	-
	- sacristy	100.00
	- Retreats, conferences & Buddhist events	-
	- donations to Buddhist causes	-
	Donations relating to ecotherapy training	684.91
	Presents for retiring trustees	-
	Independent examiner for end of year accounts	-
	<u>200.00</u>	<u>-</u>
	<u>34,609.14</u>	<u>45,110.72</u>
5	Governance Costs	-
	No trustee claimed any expenses and there were no other governance costs.	
6	No income received was earmarked (restricted) for any particular purposes. Thus all Tariki Trust's funds are unrestricted funds.	
7	Debtors	-
8	Cash and Bank	
	National Westminster main account	78,583.20
	National Westminster cash account	1,873.38
	Euros cash and bank	5,410.48
	Pay Pal	412.52
	<u>879.85</u>	<u>86,279.58</u>
	<u>97,195.11</u>	<u>86,279.58</u>
9	Creditors	0.00
10	Foreign Currency	0.00
11	Major Building Expenses	2,295.00
	<u>-</u>	<u>2,295.00</u>



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Tariki Trust

**On accounts for the year
ended**

31 December 2022

**Charity no
(if any)**

1149658

Set out on pages

9 and 10

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2022.

**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 Trust'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: C.A. Sanderson

Date: 27 July 2023

Name: Caroline Sanderson

**Relevant professional
qualification(s) or body
(if any):**

Member of the Institute of Certified Bookkeepers

Address:

11 Little Road

Edinburgh

EH16 6SH

Section B**Disclosure**

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.