

Tariki Trustees Annual Report 2023

Part 1: Reference and Administrative details

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

Charity Registration number: 1149658

Tariki Trust trustees and Management

On 31 December 2023 Tariki trustees were Paul Burt (chair), Elise Tate, Hussam Al-Nawab and Julia Samworth.

Day to day management of Tariki Trust is delegated to Stephen McCabe, 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

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. Julia Samworth joined the board in January 2023.

Trustee Training

Specific training is offered to the trustee group as appropriate to bring a 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 a 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.
- If we are to buy land and/or property in the coming year (as explained later in the report), this could pose a financial risk due to ongoing costs of upkeep.

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 month's 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.
- Any property that we buy will be covered by insurance and we intend to be frugal where initial costs are concerned; the charity will still save healthy reserves.

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.

Ten Directions Ecotherapy Training Programme

Ten Directions Certificate in Ecotherapy: The ecotherapy programme continued to be offered throughout 2023 in our popular online training format, with some in-person options offered for

those in the UK who can travel. As many of our students are overseas, the majority of people do the course fully online. This involves the completion of five online units plus 90 hours of attendance at online seminars and workshops offered over Zoom or in-person. 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 extremely popular and the number of students taking the year-long certificate remained high with 21 people enrolled in the 2022/23 course and 31 students enrolled in 2023/24.

The seminars and workshops also attracted a following of people who did not enrol for the full programme, meaning that most individual seminars continued to attract between 8-15 people. Occasionally workshops have been cancelled in early 2023 due to low numbers, but this has not been an issue since summer after we enrolled such a high number of students for the new Certificate intake.

During 2023, there were three in-person offerings, all held in Lothian, Scotland: two non-residential weekends in Midlothian and one full-day coastal walk along the East Lothian coast. All were attended by small groups of 4-7 people and these were facilitated by Stephen McCabe and Stephanie Whitelaw, a current Diploma student and past graduate of the Certificate programme.

As applications were at our record highest in 2023 (over 50 applications across the year), Caroline and Stephen started to run Recruitment Events in the summer, rather than standard one-to-one interviews. These online events invited all potential students to have a 'taster' of what our online sessions are like, as well as giving them an opportunity to talk about their interest in ecotherapy.

This year, we offered free bursaries to three students in India. All of these women have proven to be extremely engaged in the course and we hope to invite one of these students (should she graduate) to run workshops for us next year exploring storytelling and Hinduism's relationship with nature. It feels important for graduates to run workshops alongside us, helping to cement the Ten Directions course as a learning community, rather than something run by a top-down teaching team. Also, we aim to diversify the backgrounds and religious practices of our tutors. Offering training bursaries to people in developing countries – and then offering them paid teaching work if they have something to offer – seems like an excellent way to do this naturally.

The core Ten Directions staff group continues to consist of Elise Tate, Fairlie Winship, Paul Maiteny, Harriet Sams, Stephen McCabe, Sam Lewis and Caroline Brazier, and they continued to do much teaching on the programme. We continue to use Squarespace for our website, Mailchimp for publicity and Mighty Networks to deliver our online courses. Students seem to find the latter platform engaging to use and they often share photos, poems, artwork and videos in the forum.

By using Eventbrite to advertise and manage our event booking, we have attracted over 1000 'followers' on the platform, which is allowing us to reach many new people from across the globe. Our mailing list also continues to grow. Monthly newsletters are sent with updates on our upcoming workshops and Tariki Trust's general activities.

Stephen and Caroline have hosted promotional ecotherapy workshops in the summer for the popular online CPD platform, 'Online Events', and this activity has led to direct sign-ups on the Ten Directions Certificate.

In both academic years that ran in 2023, we offered over 250 hours worth of workshops for our students to choose their 90 training hours from, creating a tailored experience for students who may want to specialise their ecotherapy work in certain areas.

We received some very encouraging feedback from our 2022/23 students in the summer, demonstrating that the course is a powerful experience for many on a personal as well as professional level. Here are some quotes from the feedback forms, which are shared below with permission:

'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 loved doing some of the more hands-on things, making the mobile or mandalas. But also getting really up close with things I thought I knew. Learning to see the details. Looking back at paths travelled to encourage a perspective shift. The days we all spent together. And much more. Learning to see the details. I know that I will start to work in this direction - I'm just not sure how at the moment. But I know it is going to happen. Really just thank you. I have loved being a part of this and am quite sad that it is over.'

'The course has been quality, well thought out, passionate, supportive. From the feedback, to interaction with peers, and the monthly workshops – it's such good value for money. From a work point of view, the content is so rich and replete with content and ideas – both from the exercises and the feedback and comments. I like that the passion and delivery of the course has helped me to dive deeper into my values and to also think about my spiritual practice and work role. I feel the strongest contribution of the course will be harnessing the power of nature as I work with people. I would highly recommend this course to people interested in eco-therapy. The passion, commitment, knowledge, delivery and dedication to providing support, comments and feedback has been staggeringly impressive. I think Stephen, Caroline and Tariki should be really proud of the delivery of this course. Thank you. x'

'I know my personal life will change because I have so many more tools for my own self-care and I am hoping to be able to use what I have learned in my work as an outdoor educator.'

'I think it was a different type of learning than I thought it would be, but have enjoyed it fully. I thought it would be a more traditional "teaching" course but this was very experimental and self-reflective, to just let the thoughts rise without pinpointing anything specifically. I enjoyed a lot the weekly exercises! You realized the things that started circling in the unconscious, too, and it was nicely intensive during the modules.'

'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. Stephen has been absolutely brilliant throughout this time. I felt his 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!'

Ten Directions Diploma in Ecotherapy: for several years now we have been offering an optional second year of training for students who had taken the Ten Directions Certificate in Ecotherapy and are looking for support to develop their ecotherapy practice. This programme provides a mix of mentoring and ongoing training. In 2022, this second year was consolidated into a Diploma Programme.

The Diploma programme is designed to be flexible, meeting the needs of students with a variety of specialisms, working in different therapeutic, mental health and community settings. It consists of monthly gatherings attended by all students; a project supported by a mentoring process; completion of a professional studies unit; and 90 hours of attendance. Caroline co-ordinates the programme and facilitates the monthly gatherings which are partly based around journal activities relating to professional development which are sent out in advance of the meetings. Other staff offer one to one mentoring. Staff and students are paired according to their common interests and specialisms. Two students took the programme in 2022/23. In September 2023 three new students enrolled. Because of the nature of the project and the mentoring, a few students from previous intakes are still completing their projects.

Free Events and Book Launches

We hosted a number of free and donation-based online events in 2023, offering wellbeing events as well as Buddhist-themed talks and a free book launch event for Nagapriya's book, 'The Promise of a Sacred World'. In July 2024, we will also launch Mary Reynolds Thompson's launch for her new book, 'The Way of the Wild Soul Woman', with a free/donation-based online event.

Supervision Group

In October 2023, in response to a number of requests, we decided to launch a supervision group for graduates of the Tariki Ecotherapy programme. This group meets monthly for 90 minutes, and was initially advertised for six sessions running October to March, but will be extended due to its success until June 2024. The group, which is led by Caroline, consists of six practitioners. This number is ideal for supervision and we have set a maximum of 8 participants for future groups.

Buddhist Psychology and Other-Centred Approach

In the spring of 2023, Caroline offered a series of six introductory workshops on Buddhist psychology and other-centred approach. Sadie Mansell and Claire Wirsig ran a workshop entitled Avalokiteshvara: Compassion, Responsibility, and Self-Care in April 2023. These were followed in the autumn of 2023 by another workshop run by Caroline on the Ant Hill Sutta – a text which provides an important description of the Buddhist understanding of layers of resistance in the mind. Throughout the academic year 2023/24 Caroline is also running a series of workshops on working with the elements (meditations on the elements are traditional Buddhist practices, exploring the elements both within the body and in the environment). Caroline also offered an introductory workshop on the other-centred approach through the organisation Online Events which has proved a useful way of raising interest in Tariki courses within the counselling community.

Buddhist Teaching

Buddhist Classes continued to be offered online twice a month throughout 2023. Each month, one of these classes was focused on the teaching of chanting practices and the second on study. We completed our teaching series on The Twelve Lights of Amida in the first half of the year. This compared texts by Tan Luan, Shinran and Ippen. In July we started a new series of sessions, called

the Heart of Amida which is looking at two texts commonly used in Jodo Shinshu practice, both of which come from the Larger Pure Land Sutra: Sanbutsuge and Juseige. These classes were led by Enrique Galvan-Alvarez and Caroline. In addition to these regular classes, we held solstice events in summer and winter, consisting of an online Buddhist service and Dharma talk. In October Enrique also offered a workshop on Shomyo chanting, an ancient Japanese form of chanting which draws on the sounds of nature, for students on the Ten Directions programme and the general public.

Other Involvement with Jodo Shinshu

In 2023 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. In September she hoped to travel to Dusseldorf to attend the European Shin Buddhist conference but was unable to go as she was suffering from concussion following an accident. She attended online instead. She also attended Hoonko celebrations held in Dusseldorf in November online. In November Caroline and Enrique both attended a conference in Malvern, UK, which was a gathering of Pure Land Buddhists from different groups within the UK. This conference was attended by priests and lay people from Jodo Shinshu (Nishi and Higashi), Bright Dawn, Amida Shu, and Triratna and was an opportunity to meet one another and share practice.

Psychotherapy

Caroline continues to work with a small number of ongoing clients and supervisees on Zoom. The training agency which was originally established in 2021 to offer placements to students on the psychotherapy training programme continued to operate in the early part of 2023. As students had all completed their studies, it became a counselling service, operating within Tariki Trust and organised by a team of graduates headed by Claire Wirsig, however during the spring of 2023 its level of activity dwindled. Some of those involved have, however, continued to meet for peer supervision sessions as they establish themselves in private practice.

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. Stephen McCabe and Debbie Swain receive small ad hoc payments for administrative work done in agreement with the trustees. Teaching staff and other presenters receive honoraria or sessional fees in appreciation of their 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

Tariki Trust has continued to deliver a substantial programme of events, mostly focused on its training in ecotherapy. This programme, which is based on a Buddhist understanding of psychology, has grown from strength to strength. In 2023 we saw an increase in applications which resulted in 31 enrolments at certificate level and 3 at diploma level, both increases on 2022 intakes. In addition, we have seen a number of graduates of the programme joining the teaching staff, supporting the vibrancy of the Tariki community. In response to these increased numbers, several of the core staff have had to step up in the autumn of 2023 with Sam and Harriet joining the main teaching team alongside Stephen in delivering the online units. This larger student body has meant that online workshops continue to be well attended despite a drop in casual online attendances resulting from the end of Covid restrictions.

Our staff team continues to engage in a collaborative approach to decision making through online gatherings and also through the creation of WhatsApp groups and decision-making forums. In June 2023 we held an overnight meeting, camping in a wood in Cumbria attended by four Tariki staff at which we shared ideas and discussed practice.

Tariki Trust continues to be international in its outlook. 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 UK, USA, India, France, Finland, Australia, New Zealand and Romania. In 2023 we offered free places to three students from India, in part funded by a bequest made by a former friend and supporter, Derek Goldby. To support our students in Australia and New Zealand, we started to run extra monthly sessions at 9am (WET), as they sometimes struggle with timezone differences to attend other workshops.

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.

Part 5: Financial Review

Income during the year increased somewhat: £54,490 in 2023 as opposed to £45,524 in 2022. This included a bequest of £1000 from Derek Goldby, an old friend of Tariki Trust who had lived in The Buddhist House in the past and died in 2022. Expenditure was £39,836 in 2023 as opposed to £34,609 in 2022, and the total funds held at the end of 2023 were substantially greater than those held at the end of 2022 (£112,299 in 2023 as opposed to £97,195 in 2022). The healthy balance reflects the prudent approach which has been taken since the closure of the psychotherapy training programme and the ending of operations at the Buddhist House. However, we have increased our outgoing payment rates for guest tutors considerably – over the line of inflation – and the trust continues to benefit from a high number of people attending our courses throughout the year.

In terms of income, the major part of that taken in 2023 once again came from student fees. These fees made up the bulk of income in 2023, as they did in 2022.

Catering and venue hire fees were limited to three attendance-based events in Scotland. Computer costs included the purchase of a new laptop for Stephen who continues to provide the bulk of the admin support for the Ten Directions Certificate. Otherwise, the bulk of the outgoing costs were spent on teaching fees and the management of the online websites and platforms where we deliver and advertise our courses. It is apparent in the figures that a greater amount was paid out in 2022 than in 2023 on phone and internet. This in fact reflects the fact that due to variations in the timing of annual payments for web hosting and services, two sets of payments were taken in 2022 and none in 2023. The trustees also made higher honoraria payments in 2023 than they had in 2022 to Debbie and Stephen during the year to better reflect the amount of admin work that they do (Stephen for the course admin, Debbie for her finance work). These payments amounted to £6188 for Stephen and £1372 for Debbie.

Overall, we can see that 2023 was another very successful year for Tariki Trust. We have continued to look into the possible purchase of a piece of land on which we can conduct ecotherapy events. 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. However, we are now considering the purchase of a suitable community building in 2024, should one become available, instead of land. It appears that the purchase of suitable land is very difficult given our location needs and budget; little of interest has come onto the market in the three years in which we have been searching.

As we go forward into 2024, 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

2023 was a good year for Tariki Trust so we plan to build on this success in the year to come. In particular we hope to offer more in-person events and with that in mind are continuing to look into the possibility of purchasing a small piece of woodland or other rural space. 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 2023, yet responding to the changing landscape of online learning as the year goes on.
- 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 and to publicise our events and training.
- To look into other channels for promoting Tariki events and services
- 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 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 maintain firm financial and managerial systems so that the organisation continues on a solid basis
- To offer Buddhist teaching and practice online
- To continue to deliver events related to Buddhist psychology, psychotherapy and Buddhist practice.
- To foster our links with Jodo Shinshu and other Buddhist traditions and to support their activities.
- To explore investing in our own land in the Scottish Borders which we can use for in-person camping retreats, or perhaps a suitable community building instead.
- To attend and promote Tariki Trust at the Forest Mind conference in August 2024 in Havinkaa, Finland.

Tariki Trust Accounts for the Year Ended 31 December 2023
Statement of Financial Activity

	Note	2023	2022
Incoming Resources			
Voluntary Income: Donations	1	1,257.54	454.00
From Charitable Activities	2	53,233.15	45,070.67
Total Incoming Resources		54,490.69	45,524.67
Resources Expended			
Cost of Generating Funds	3		
Charitable Activities	4	39,386.73	34,609.14
Governance Costs	5		
Total Resources Expended		39,386.73	34,609.14
Net Incoming Resources		15,103.96	10,915.53
Net Movement in Funds		15,103.96	10,915.53
General Funds: Balance brought forward		97,195.11	86,279.58
Total Funds Carried Forward		112,299.07	97,195.11
Represented By:			
Current Assets			
Cash and Bank	8	112,299.07	97,195.11
Total Assets		112,299.07	97,195.11

Notes Forming part of the Statement of Financial Activity
for the Year to 31 December 2023

	2023 £	2022 £
1 Donations consists of		
Donations	1,257.54	454.00
	<u>1,257.54</u>	<u>454.00</u>
2 Charitable Activities Income		
Student Fees	53,083.15	44,155.82
Counselling and Supervision	150.00	330.00
	<u>53,233.15</u>	<u>44,485.82</u>
3 There were no appeals or fund-raising events in the year.		
4 Charitable Activities		
Food and Consumables	94.24	55.13
Travel and Subsistence		
Motor Running Expenses	-	146.47
Other Travel and in transit Accommodation	398.27	-
Office and Admin costs		
Printing postage and stationery	205.56	127.67
Computers	1,287.99	518.99
Phone and internet	249.55	3,308.75
Officer's Allowance	7,560.00	2,735.00
Insurance	838.25	825.70
Course Costs & Training		
- staff costs	27,656.94	25,165.25
- supervision	350.00	250.00
- subscription, hire of hall etc	255.00	40.00
- books, equipment etc.	70.93	147.19
Buddhist outreach, networking and Sacristy		
- sacristy	200.00	200.00
Donations relating to ecotherapy training	-	806.99
Presents for retiring trustees	-	82.00
Independent examiner for end of year accounts	220.00	200.00
	<u>39,386.73</u>	<u>34,609.14</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 - none		-
8 Cash and Bank closing balances		
National Westminster main account	104,509.94	91,407.64
National Westminster cash account	-	1,143.29
Euros cash and bank	3,764.33	3,764.33
Pay Pal	4,024.80	879.85
	<u>112,299.07</u>	<u>97,195.11</u>



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Tariki Trust

On accounts for the year
ended

31 December 2023

Charity no
(if any)

1149658

Set out on pages

(remember to include the page numbers of additional sheets)

Responsibilities and
basis of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2023.

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: 4 April 2024

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