

TRIRATNA BUDDHIST COMMUNITY (YORK)

England & Wales · Charity number 1189773

Details

Other names	TRIRATNA (YORK), YORK BUDDHIST CENTRE, YORK BUDDHIST GROUP
Status	Registered
Legal form	CIO
Registered	2020-06-03
Register	View on the Charity Commission register

Contact

Address	17 Walmgate York YO1 9TX
Phone	07896130018
Email	enquiries@yorkbuddhistcentre.org
Website	www.yorkbuddhistcentre.org

Activities

Objects: 3. OBJECTS THE OBJECT OF THE CIO IS TO SUPPORT THE ADVANCEMENT OF THE BUDDHIST RELIGION, IN PARTICULAR BY: 1. ENCOURAGING MEMBERS AND OTHERS TO LIVE ETHICAL LIVES IN ACCORDANCE WITH THE TEACHINGS OF THE BUDDHA. 2. SUPPORTING ORDAINED MEMBERS OF THE TRIRATNA BUDDHIST COMMUNITY AND OTHER DULY ORDAINED BUDDHISTS, AT THE DISCRETION OF THE COUNCIL OF THE CIO; 3. MAINTAINING CLOSE COMMUNICATION WITH AND WORKING UNDER THE GUIDANCE OF THE TRIRATNA BUDDHIST ORDER AND IN CO-OPERATION WITH OTHER GROUPS WITH THE SAME OBJECTS; AND 4. USING APPLICATIONS OF THE BUDDHA'S TEACHING TO PROMOTE THE HEALTH AND WELL-BEING OF ALL.

Activities: We are a community of friends who support the Buddhist religion in York mainly through our Centre and online. Our activities encourage members and others to live ethical lives in accordance with the teachings of the Buddha. We use applications of the Buddha's teaching to promote the health and well-being of all through classes and courses and other means.

Classification

- **How:** Provides Services
- **What:** Religious Activities
- **Who:** The General Public/mankind

Geography

- City Of York

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£46,379	£42,407	-	-
2023-12-31	£46,500	£37,824	-	-
2022-12-31	£55,931	£66,975	-	-
2021-12-31	£28,535	£15,098	-	-
2020-12-31	£25,660	£13,183	-	-

Trustees

Name	Role	Appointed
Dh. Shakyapada Roberts	Chair	2020-05-22
Alexandra Karen Carr-Malcolm		2023-05-24
Dr Joanne McVey		2024-05-13
MARK JAMES LEECH BSC, PHD		2020-05-22
MARK JONES		2020-01-01

TRIRATNA BUDDHIST COMMUNITY (YORK)

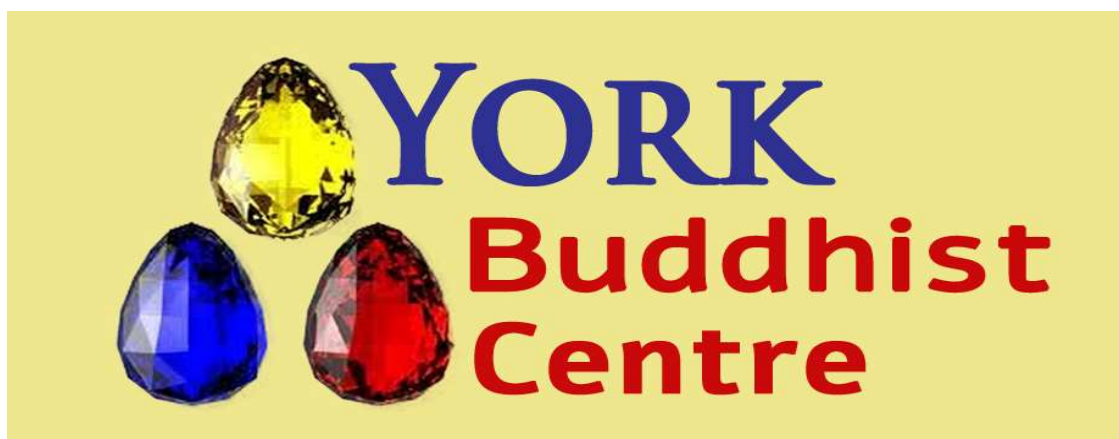
England & Wales - Charity number 1189773

Accounts

Triratna Buddhist Community (York)

Charity number 1189773

Annual Report and Financial Statements for the year ended 31 December 2024



Triratna Buddhist Community (York)

Annual Report and Financial Statements for the year ended 31 December 2024

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Prepared by West Yorkshire Community Accountancy Service CIO

Triratna Buddhist Community (York)

Trustees' report for the year ended 31 December 2024

Reference and administrative details of the charity, its trustees and advisors

The trustees during the financial year and up to and including the date the report was approved were:

Name	Position	Dates
Dr Shakyapada Jenny Roberts	Chair	
Mark Jones	Treasurer	
Kathryn Readman		Resigned 1 February 2024
Mark James Leech		
Frances Irene Hooker		Resigned 9 Dec 2024
Dr Joanne McVey		Appointed 13 May 2024
Alexander Karen Carr-Malcolm		

Charity number	1189773	Registered in England and Wales
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Registered and principal address	Bankers
17 Walmgate	Triodos Bank plc
York	Deanery Road
YO1 9TX	Bristol BS1 5AS

Independent examiner

Sarah Coates MAAT

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a Charitable Incorporated Organisation (CIO) association formed on 3 June 2020 and is governed by a constitution.

Method of recruitment and appointment of trustees

The trustees of the charity are appointed by the members at the AGM.

Objectives and activities

The charity's objects

The object of the CIO is to support the advancement of the Buddhist religion, in particular by:
Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.
Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the council of the CIO.

Maintaining close communication with and working under the guidance of the Triratna Buddhist order and in co-operation with other groups with the same objects.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2024

Objectives and activities continued

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

We are here to support people who wish to learn about and practise Buddhism. In order to achieve this we provide courses and classes which explore Buddhist practice. These include teaching basic meditation techniques to complete beginners, and more advanced classes and courses for those who want a deeper understanding of Buddhist practice and how this can be explored in contemporary society. We have a small Spiritual and Gift shop to provide access to meditation accessories, etc. and Buddhist literature not easily available elsewhere. All the work and teaching at our Centre, including the shop, is carried out by volunteers. No one is paid. We raise money from donations at the classes and events and from members of the Sangha (community). We aim to promote the Buddhist ethic of 'dana' or giving, so most of our activities are paid for by donation. People are free to attend even if they have no money. We have a commitment to making our activities and premises accessible to all by providing access for disabled people.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the Council of the CIO;

At the moment we do not support anyone. However, this may be necessary in the future as we grow, The contribution made by members of the Triratna Buddhist Order remains essential to provide the experience, depth of practice and understanding of Buddhism needed in a spiritual community, and to make this available to others.

Maintaining close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects;

We work in co-operation with other Triratna Centres, Retreat Centres and with the Preceptors College (which oversees the Ordination process). This allows us to maintain clarity with regard to our vision, to benefit from the experience of other groups with similar objectives, and so make the best use of the resources we have in York.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Triratna Buddhist Community (York) is committed to encouraging equality, diversity and inclusion among our sangha, and eliminating discrimination. Everyone is welcome regardless of age, disability, gender, race, religion or belief, income, sex and sexual orientation. People attending our classes or events classes do not have to be a Buddhist or feel the need to become a Buddhist.

Specifically, we do this by:

- a. Holding services of worship and devotion;
- b. Organising talks, courses, classes meditation sessions and retreats;
- c. Publishing materials (written and online);
- d. Raising funds and invite and receive contributions.

Our aim is to encourage members and others to live ethical lives in accordance with the teachings of the Buddha. So, the Triratna Buddhist Community (York) provides an understanding of Buddhism through a programme of classes and events, both for regular members of our group as well as for newcomers from the local community and others.

One of the main aspects of the Buddha's teaching is a grounding in Buddhist ethics. These ethical values are central to, and are threads that run through all the Buddha's teachings. Non-Buddhists are in no way expected or required to take on or follow these precepts. Instead, they are invited to test the ethical principles in their own lives to determine their effects on themselves and others around them, for the enhancement and benefit of society as a whole.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2024

Objectives and activities (continued)

These ethical values are expressed in both a positive and negative form in what are called The Five Precepts:

Negative formulation:

- I undertake to abstain from taking life.
- I undertake to abstain from taking the not-given.
- I undertake to abstain from sexual misconduct.
- I undertake to abstain from false speech.
- I undertake to abstain from taking intoxicants.

Positive formulation:

- With deeds of loving kindness, I purify my body.
- With open-handed generosity, I purify my body.
- With stillness, simplicity, and contentment, I purify my body.
- With truthful communication, I purify my speech.
- With mindfulness clear and radiant, I purify my mind.

The charity's main activities

We are a community of friends who support the Buddhist religion in York mainly through our Centre and online. Our activities encourage members and others to live ethical lives in accordance with the teachings of the Buddha. We use applications of the Buddha's teaching to promote the health and well-being of all through classes and courses and other means.

Public benefit statement

In setting our objectives and planning our activities the Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the advancement of religion, encouraging members and others to live ethical lives in accordance with the teachings of the Buddha and, through those teachings, promoting the health and well-being of all.

Achievements and performance

This has been our second full year in our new premises at 17 Walmgate, York and, as such, has been marked by a further period of consolidation. There has been an emphasis on building on our offering to our sangha (community) and the general public in York. We have continued to grow our sangha with the arrival of new members and many individuals have also deepened their practice and their involvement in the centre. Our team of volunteers has grown substantially and our teaching team has continued to grow as sangha members acquire more experience .

Financially we have begun to pay off the refurbishment loan which we received from Windhorse publications in 2022 and we have established a new management team to take over from our current Chair in due course.

Buddhism and Meditation

1. Classes and Courses

We began the year with two meditation classes: Wednesday lunchtimes attended by around six to ten people each week and Saturday Mornings attended by around 12 to 15 people.

We held a Practice Night every Wednesday, mainly for members of our sangha but open to others too, with changing themes reflecting Buddhist practice.

Breaking new ground, in May, we ran a daytime Introduction to Buddhism which attracted around ten participants. At the end six of the participants asked for classes to continue and so we continued to run meditation and Buddhism classes each Thursday for the rest of the year and continuing into 2025. These classes have been very popular with those who can't or don't wish to attend on an evening and have attracted new people. By the year end there were around 12 regulars attending each week and a daytime community (sangha) was forming.

In view of the success of the Thursday class - and our limited teaching resources it was decided to cease the Wednesday lunchtime meditation at the end of December and instead invite people to come just for the first half meditation on Thursdays, if they wished.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2024

Achievements and performance continued

We also ran our usual Introduction to Buddhism Courses in January, April June and September. These courses were well attended with bookings of up to 28 people. As an innovation, at the end of the September course we invited participants to join our community on the Wednesday Practice Night where they heard accounts from sangha members about what their Buddhist practice meant to them. Some of these course members chose to continue attending events at our centre and practice with us.

We ran two introduction to meditation courses this year (one more than last year) - in February and October - which proved popular and were attended by around 20 people.

Retreats

Weekend residential retreats included a three-night Spring retreat at Adhithana (our main retreat centre in Herefordshire) with the theme of The Three Myths. Seventeen York sangha members attended and two sangha members from the Scarborough Group and one from the Leeds Centre plus two guest Order Members - Taravandana (our centre's spiritual friend from Manchester) and Mahasraddha (one of our trustees from Scarborough) - joined us to lead the event.

A second retreat was held over two nights at Barmoor on the edge of the North Yorkshire Moors. This was a new venue for us and proved to be very successful, particularly as the costs were lower and the venue nearer to York. Fifteen sangha members attended. The theme was the Taste of Freedom.

In August our main Triratna retreat centre at Adhithana, Herefordshire, hosted a 'Summer Sanghas' Retreat for sanghas from around the country. We were invited and six of our sangha attended to study, along with around 60 others, the Buddha's teaching on loving-kindness.

In January Taravandana led a special Day Retreat for North-Eastern women who had asked for Ordination and we explored the Dasa Dhamma sutta together. She also led another well-attended Day Retreat for all-comers in April with the theme of 'Teachers of Enlightenment - The Tree of Refuge and Respect'

Mitras

In June there was a Sunday morning event on the theme of becoming a mitra. This was attended by six people, three of whom asked to become mitras later in the year. A Mitra Ceremony took place in November when three of our sangha made a commitment to their Buddhist practice. Two more asked to be mitras in December and their ceremony was held in January 2025.

We now have thirteen active mitras six of whom are training for ordination

Study

From January to July we ran four study nights for around fifteen community members. One of the study groups completed their course in the Spring. In the autumn - again because of limited teaching resources - we ceased the Foundation Year study group and consolidated two of the other smaller study groups, reducing study to two groups (years 2 and 3) with a total of around sixteen people.

Educational Visits

Mark Jones visited a number of schools during the year to do meditation and talk about Buddhist practice.

These were: Ralph Butterfield School in Haxby, Fishergate Primary and the Mount school in York. on 25th October. An SEN group from Knavesmire Primary visited the centre. We remain open to educational visits in 2025 subject to a payment towards our costs.

Personnel and Management

Amalasarā, who was our mitra convenor, decided to move back to the Leeds Buddhist Centre and so resigned from that role and as a trustee on 1st February 2024. However she continued leading Year Three study for us until June. We held a special evening, rejoicing in her merits and expressing gratitude for her involvement with the York sangha over nearly seven years at the end of May.

Frances Irene Hooker (Khemasuri) resigned as a trustee in December

Jo McVey was appointed as a trustee in May.

Maitrikirana became our new Safeguarding Officer in March.

The Centre Team met six times through the year in person and the Trustees met 3 times alternating with in-person and Zoom meetings.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2024

Achievements and performance continued

In January and June Shakyapada, our Chair, attended the European Chairs Assembly (ECA) at Adhithana. Each week consisted of business discussions, practice sessions and talks and is designed to support Centre Chairs and others in their practice both spiritual and functional. The ECA also provides excellent resources for centres by whom it is supported. Triratna Buddhist Community (York) aims to donate 5% of income (less gift aid) to the ECA funds - these are used to employ various specialist teachers and advisors who are available to centres.

Our six year lease on 17 Walmgate had a break clause at 3 years which would have been May 2025. In order to break our lease we would have had to formally notify the landlord by December of this year.

This caused us to reflect as a team on our Chair Shakyapada's age. She was 80 in September this year and, so far, is the only Order member active on a day to day basis in York. Though in good health she felt that holding the responsibility until 2028 when the lease ended would be too much and various discussions were held to consider activating the three year break clause. However, all of us including Shakyapada, felt that we did not wish to break the lease and resort to renting rooms again.

After much discussion between Shakyapada and the three senior mitras (who are all training for Ordination) it was decided that most of Shakyapada's duties, apart from teaching and general oversight, could be carried out by them. So we asked our landlords if we could delay the break for a year - so that the need for notice would move to December 2025. This was agreed, and a legal change was drawn up and agreed by all parties.

The new management team was set up and named as 'The Palas'. Pala is an old pali word which means protector or guardian. The new three-person team comprises Mark Jones (admin and financial), Joanna McVey (sangha lead) and Susan Warburton (centre manager). All three will report to Shakyapada directly and together to the Trustees. The pala meets fortnightly to discuss any issues which have arisen.

At the time of writing in March 2025, this new structure is working very well. Shakyapada has a lighter load and the centre organisation is working even better with a bigger team of experienced people managing it. We are optimistic that this solution will keep the centre (and the charity of which it is a part) running and financially viable until one or more of the three palas becomes an Order member.

It is felt that it is unlikely that we will need to exercise the break clause in December 2025, but the option remains on the table if needed.

Financial

In 2023 Shakyapada our Chair expressed a need to reduce the large contribution that she had been making every month and donate a more manageable amount. Accordingly her contribution was gradually reduced by £600 per month through the early part of 2024. This was replaced with additional income in the form of increased donations from our sangha following an appeal and increased donations from courses and meditation classes. This means that the centre is now much more sustainable and no longer relies on one major donor.

Our income is made up of monthly standing orders, donations(dana) at classes, courses, day retreats and residential retreats and other events plus registration fees for courses and retreats. Apart from these small registration fees we do not charge for any of our events but encourage people support our work through donations. This reflects the Buddhist virtue of generosity both from the centre's perspective and from individuals who respond to our appeals for support. Gift Aid is also a valuable source of income.

As usual no one was paid during the year - all classes were led by volunteers.

When we moved to the new centre in 2022 we took out a loan of £20,000 in order to build an additional wall, create a special shrine background, lay floor coverings and enable other work. The trustees felt that the interest payments - though taken out at an advantageous rate - were a drain on our finances and it was resolved to make extra payments each year. This year we have been able to pay off an additional £3,000 over and above the normal agreed payments which leaves a balance of £12,251 which we hope to pay off by the end of 2026 which will be two years early.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2024

Achievements and performance continued

Fund Raising

We held a 'paint a tile for the Dharma' in December 2023 and January 2024, a sangha social evening at St Olave's Church Hall in February with hot food provided by members followed by a quiz and a raffle, and a 'Fleamarket' at the centre in March. Altogether our fundraising raised just over £2000 for our funds. However, when our main fundraiser left in April because of poor health, it was decided that instead of organising fundraising events, the rest of our small team should put its energy into our main function as a charity, namely holding classes and courses for those interested in practising meditation and Buddhism. This has proved to be a good decision and the extra income from these activities has more than made up for the loss of fundraising events.

Publicity

In order to publicise our classes, courses and retreats we regularly post details on Facebook and Instagram, referring those interested to our well-used and up-to-date website. We also use paid advertising on Facebook for each course that we run and our newsletter is sent out electronically to a growing mailing list each week. Being situated on a busy street near the centre of York, we also benefit from the illuminated posters on display in our windows and the leaflets available outside the door.

In addition, having been established in York for seven years now, our Google ranking on searches is often number one after the paid-for adverts and our profile on Google Maps is popular and has five x five-star reviews.

We believe that we are becoming a well-known presence in the city and are becoming the 'go-to' place for information on Buddhism and meditation.

Summary

In conclusion, this has been another successful year for our charity when we have been able to reach out to more people, helping them with their lives and spreading the remarkably helpful teachings of the Buddha. After seven years of activity in York we now have a team of very experienced practitioners who will eventually be able to take over the running of the centre in a few years as and when Shakyapada needs to be less involved.

Our centre and sangha has always had a reputation for being warm, friendly and welcoming to new people. This is very important to us and will remain the bedrock of our future activities.

Financial review

The net receipts for the year were £3,972, all of which was unrestricted.

Reserves policy

The charity's free cash reserves, at the year end were £29,179, however the balance on the loans repayable was £15,251, leaving approximately £14,000.

A 'winding up' reserve of £15,000 (plus £4,550 rent bond and £4,550 advance rent payments) should be ring-fenced.

We should also work towards having at least £15,000 in the current account on each quarter day before the rent goes out. Once these commitments have been met, any surplus funds should be allocated to a Centre Development Fund.

Approved by the board of trustees on 07/07/2025

Mark Jones (Trustee)

Triratna Buddhist Community (York)

Independent examiner's report to the trustees of Triratna Buddhist Community (York)

I report to the charity trustees on my examination of the accounts of the CIO for the year ended 31 December 2024, which are set out on pages 9 to 12.

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO's accounts as carried out under section 145 of the 2011 Act. 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 giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 130 of the Charities Act;
- 2 the accounts do not accord with those records.

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.

Sarah Coates MAAT

09/07/2025

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Triratna Buddhist Community (York)
Receipts and payments account
for the year ended 31 December 2024

	Notes	2024 Total funds £	2023 Total funds £
Receipts			
Grants and donations	(2)	20,486	26,840
Shop sales		1,024	1,562
Other income		519	241
Gift aid		6,701	6,330
Courses		10,421	3,482
Retreats		4,465	6,821
Fundraising		2,763	1,224
Scarborough income		-	-
Total receipts		<u>46,379</u>	<u>46,500</u>
Payments			
Marketing and publicity		1,185	524
Books, resources and stock		1,063	1,558
Accountancy and independent examination		829	554
Rent, rates and room hire		19,276	19,652
Retreat costs		4,141	3,242
Legal and professional		77	57
Training		167	711
IT software and consumables		453	862
Furniture and equipment		168	15
Bank charges		662	603
Utilities		2,936	3,311
Insurance		1,273	1,243
Sundry		889	860
Donations to ECA		1,800	1,350
Telephone		488	370
New premises costs		1,474	691
Other donations		108	307
Loan repayment		5,400	1,400
Travel		-	46
Speaker fees		18	468
Scarborough payments		-	-
Total payments		<u>42,407</u>	<u>37,824</u>
Net receipts / (payments)		<u>3,972</u>	<u>8,676</u>
Fund balances brought forward		<u>25,207</u>	<u>16,531</u>
Fund balances carried forward	(3)	<u>29,179</u>	<u>25,207</u>

Triratna Buddhist Community (York)
Statement of assets and liabilities
as at 31 December 2024

	2024	2023
	Total	Total
	£	£
Cash funds		
Cash at bank	29,116	25,137
Cash in hand	63	70
Total cash funds	<u>29,179</u>	<u>25,207</u>

Debtors and prepayments	2024
	£
Prepayments	599
	<u>599</u>

Assets retained for the charity's own use
 21 x stackable chairs
 HP laptop
 Wooden framed stackable reception armchairs
 Screens
 Ikea furniture

Liabilities	2024
	£
Loans repayable within one year	4,816
Loans repayable after one year	10,435
Accruals	627
	<u>15,878</u>

The financial statements were approved by the board of trustees on 07/07/2025

Mark Jones (Trustee)

Triratna Buddhist Community (York)

Notes to the accounts

for the year ended 31 December 2024

1 Accounting policies

Basis of accounting

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

Taxation

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

Triratna Buddhist Community (York)
Notes to the accounts continued
for the year ended 31 December 2024

2 Grants and donations	2024	2023
	Total	Total
	funds	funds
	£	£
Dana - General Donations	566	449
Dana - Newcomers	-	1,862
Dana - Recurring Payment	561	976
Dana - Meditations	1,246	1,965
Dana - Standing Orders	14,799	18,492
Dana - Study	285	125
Dana- Mindful movement	366	200
Dana- Practice night	2,540	2,771
Dana- Yoga /Crystal bath	123	-
	<u>20,486</u>	<u>26,840</u>

Related party transactions

Trustee expenses

No trustee received any expenses during this year or the previous year.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this or the previous year.

4 Funds held as agent	Balance b/f	Incoming	Outgoing	Balance c/f
	£	£	£	£
Scarborough Buddhist group	155	594	714	35
	<u>155</u>	<u>594</u>	<u>714</u>	<u>35</u>

Fund name

Scarborough Buddhist group

Additional information

We are administering funds for the Scarborough Buddhist group until they can get a bank account set up.

TRIRATNA BUDDHIST COMMUNITY (YORK)

England & Wales - Charity number 1189773

Accounts

Triratna Buddhist Community (York)

Charity number 1189773

Annual Report and Financial Statements

for the year ended 31 December 2023



Triratna Buddhist Community (York)

Annual Report and Financial Statements for the year ended 31 December 2023

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Triratna Buddhist Community (York)

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Shakyapada Jenny Roberts	Chair	
Mark Jones	Treasurer	
Kathryn Readman		Resigned 1 February 2024
Mark James Leech		
Frances Irene Hooker		
Alexander Karen Carr-Malcolm		Appointed 24 May 2023
Charity number	1189773	Registered in England and Wales
Registered and principal address	Bankers	
17 Walmgate	Triodos Bank plc	
York	Deanery Road	
YO1 9TX	Bristol BS1 5AS	

Independent examiner

Sarah Coates MAAT

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

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Method of recruitment and appointment of trustees

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Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2023

Objectives and activities

The charity's objects

The object of the CIO is to support the advancement of the Buddhist religion, in particular by:

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the council of the CIO.

Maintaining close communication with and working under the guidance of the Triratna Buddhist order and in co-operation with other groups with the same objects.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

We are here to support people who wish to learn about and practise Buddhism. In order to achieve this we provide courses and classes which explore Buddhist practice. These include teaching basic meditation techniques to complete beginners, and more advanced classes and courses for those who want a deeper understanding of Buddhist practice and how this can be explored in contemporary society. We have a small Spiritual and Gift shop to provide access to meditation accessories, etc. and Buddhist literature not easily available elsewhere. All the work and teaching at our Centre, including the shop, is carried out by volunteers. No one is paid. We raise money from donations at the classes and events and from members of the Sangha (community). We aim to promote the Buddhist ethic of 'dana' or giving, so most of our activities are paid for by donation. People are free to attend even if they have no money. We have a commitment to making our activities and premises accessible to all by providing access for disabled people.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the Council of the CIO;

At the moment we do not support anyone. However, this may be necessary in the future as we grow, The contribution made by members of the Triratna Buddhist Order remains essential to provide the experience, depth of practice and understanding of Buddhism needed in a spiritual community, and to make this available to others.

Maintaining close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects;

Public benefit statement

We work in co-operation with other Triratna Centres, Retreat Centres and with the Preceptors College (which oversees the Ordination process). This allows us to maintain clarity with regard to our vision, to benefit from the experience of other groups with similar objectives, and so make the best use of the resources we have in York.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Triratna Buddhist Community (York) is committed to encouraging equality, diversity and inclusion among our sangha, and eliminating discrimination. Everyone is welcome regardless of age, disability, gender, race, religion or belief, income, sex and sexual orientation. People attending our classes or events classes do not have to be a Buddhist or feel the need to become a Buddhist.

Specifically, we do this by:

- a. Holding services of worship and devotion;
- b. Organising talks, courses, classes meditation sessions and retreats;
- c. Publishing materials (written and online);
- d. Raising funds and invite and receive contributions.

Our aim is to encourage members and others to live ethical lives in accordance with the teachings of the Buddha. So, the Triratna Buddhist Community (York) provides an understanding of Buddhism through a programme of classes and events, both for regular members of our group as well as for newcomers from the local community and others.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2023

Objectives and activities (continued)

One of the main aspects of the Buddha's teaching is a grounding in Buddhist ethics. These ethical values are central to, and are threads that run through all the Buddha's teachings. Non-Buddhists are in no way expected or required to take on or follow these precepts. Instead, they are invited to test the ethical principles in their own lives to determine their effects on themselves and others around them, for the enhancement and benefit of society as a whole.

These ethical values are expressed in both a positive and negative form in what are called The Five Precepts:

Negative formulation:

- I undertake to abstain from taking life.
- I undertake to abstain from taking the not-given.
- I undertake to abstain from sexual misconduct.
- I undertake to abstain from false speech.
- I undertake to abstain from taking intoxicants.

Positive formulation:

- With deeds of loving kindness, I purify my body.
- With open-handed generosity, I purify my body.
- With stillness, simplicity, and contentment, I purify my body.
- With truthful communication, I purify my speech.
- With mindfulness clear and radiant, I purify my mind.

The charity's main activities

We are a community of friends who support the Buddhist religion in York mainly through our Centre and online. Our activities encourage members and others to live ethical lives in accordance with the teachings of the Buddha. We use applications of the Buddha's teaching to promote the health and well-being of all through classes and courses and other means.

Public benefit statement

In setting our objectives and planning our activities the Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the advancement of religion, encouraging members and others to live ethical lives in accordance with the teachings of the Buddha and, through those teachings, promoting the health and well-being of all.

Achievements and performance

At the start of this financial year we had only been in our new centre for six months so the last twelve months have been a period of consolidation for our charity with an emphasis on building on what we offer, building our sangha (community) and building our financial reserves.

Buddhism and meditation

We began the year with the usual mix of meditation classes: Guided meditation on Monday Wednesday and Thursday lunchtime, on Monday and Thursday teatime and on Saturday mornings. However with so few people able to lead meditation and poor attendance at some classes we decided in May to consolidate the meditation sessions to just Wednesday lunchtimes and Saturday Mornings. This turned out to be a good decision. By the end of the year the Wednesday lunchtime session was regularly attended by around 10 people each week and Saturdays by 10 to 15 people.

We ran seven day retreats through the year which were attended by between 8 to 20 people. The themes ranged from meditation through Dream Workshop to Buddhist teachings and study.

We ran Sangha (community) Night each Wednesday as usual with changing themes reflecting Buddhist practice, and - in the Spring and Autumn - weekend residential retreats at The Beamsley Project for two and three nights respectively. We also ran our usual Introduction to Buddhism Course regularly in January, March May and September. These introductory courses were well attended with a class of around 20 each time, from which some individuals chose to join our community and continue their practice with us.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2023

Achievements and performance continued

Six Order members from other parts of Triratna visited us at various times in the year to lead day retreats or sangha nights.

In April we ran a Twenty-Four Hour Meditation Challenge to raise money towards a new retreat centre for women training for ordination. People could join us at any point during the 24 hours and stay for as long or short as they wished. This was a great success and raised well over £2000 in donations as well as attracting new people to the centre.

In May, breaking new ground, we ran a young peoples' course over four Friday Evenings. This was attended by around 10 people under 30 and was a success. However currently we have very few young people in our centre so we did not have the resources to make the most of this enthusiastic beginning. It was felt that we should wait until we had a small community of under 30's before running the course again.

In July our main retreat centre at Adhithana, Herefordshire, hosted a 'Summer Sanghas' Retreat with sanghas from around ten centres participating. We were invited and ten of our sangha attended to study, along with around 80 others, the Bodhicaryavatara - an ancient Buddhist text.

Through the year we ran three study nights which up until the summer included around sixteen community members. In October we introduced a fourth study group and, with newcomers to the first year study the numbers rose to twenty-three.

We had an Open Day on 21st October with meditations every half hour through the day and a number of short talks. It proved to be a popular way of introducing newcomers to our centre and our activities and will be repeated each year.

In November we ran a new course teaching our main meditation practices. This was a great success with 22 people attending and will be repeated several times in 2024

At the beginning of October we introduced a Mindful Movement class on Thursday teatimes. This built slowly over the last few months of the year and is a continuing feature in 2024.

At the end of this year we had twenty-two mitras (those who have committed to Buddhist Practice) out of which eight are training for ordination.

Personnel and management

In February we appointed Amalasarā as our Mitra Convenor to look after the growing number of Mitras (committed Buddhists) in our sangha.

One new trustee was appointed in May: Maitrikirana.

The Centre Team met every month through the year in person and the Trustees every 3 months alternating in-person and Zoom meetings.

Shakyapada, our Chair, attended two week-long events at Adhithana (January and June) for European Chairs (ECA). Each week consisted of business discussions, practice sessions and talks and is designed to support Centre Chairs and others in their practice both spiritual and functional. It also provides excellent resources for centres by whom it is supported. Triratna Buddhist Community (York) aims to donate 5% of income (less gift aid) to the ECA funds - these are used to employ various specialist teachers and advisors who are available to centres.

Reviewing our work and income at YBC

In August our Spiritual Friend, Taravandana, joined us for a day and led the centre team in a visioning exercise which examined what we were doing at the centre, our objects, our vision and other options. This led to a second team meeting in September, without Taravandana, when the centre team created new plans and a new vision for the future. Briefly these include:

A two year 'playlist' of Dharma subjects was drawn up so that we could make sure that all the key teachings were covered at sangha night at least once every two years

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2023

Achievements and performance continued

Sangha Night - originally only for regular members only - was extended to include newcomers and the content was adjusted to cater for all levels of experience. This has increased numbers from around 10 people some weeks to a class as high as twenty-five people on one occasion.

Sangha Night was renamed Practice Night which was felt to be more inclusive and a more accurate description.

Since income was not rising as fast as needed we determined to be clearer about the centre's need for financial support at each class and to develop fundraising and donation plans.

Shakyapada our chair also expressed a need to reduce the large contribution that she has been making every month and donate a more manageable amount. There followed a discussion on how this could be managed without creating an annual deficit.

Accordingly we instituted a fundraising plan with a year on year target from October 23rd to October 24th of £5,200. All money raised is intended to go towards building our reserves (see below).

Our other income is made up of monthly standing orders, donations(dana) at classes, courses, day retreats and residential retreats and other events plus registration fees for courses and retreats. Apart from small registration fees we do not charge for any of our events but encourage people to donate. This reflects the Buddhist virtue of generosity both from the centre's perspective and from individuals who respond to our appeals for support. Gift Aid is also a valuable source of income.

We resolved to increase this by an appeal for more standing orders (see below) and a clearer request for donations at each class.

As usual no one was paid during the year - all classes were led by volunteers. A small amount of dana went to supporting two of the visiting Order members.

Fund Raising

In line with our visioning exercise our new fundraising plan began with a 'Stoptober' appeal in October, encouraging sangha members to give something up for the month and get sponsored for this by family and friends. This raised £327

In November we began to sell wooden 'Buddha tiles' which could be painted by sangha members (at home or at a Saturday afternoon workshop) and then returned to be mounted on our shrine room walls. This has raised £ 640 so far.

Following the visioning meetings in August and September our funding pattern will change in 2024 with Shakyapada beginning to withdraw from supporting the centre with big donations each month and the sangha being encouraged to fill the gap. So on 25th October we held a special evening 'Nourishing the Lotus Pool' introducing our budget for 2024 and discussing the need for additional monthly standing orders to cover the revenue which we would be losing. We had an excellent response to this from the sangha, raising an extra £422 per month to ensure that a break-even or small surplus was possible in 2024. The balance of Shakyapada's reduced donations will come from additional class dana and new events and we are confident that the centre can create a small surplus next year.

Publicity

To publicise our classes, courses and retreats we regularly post details on Facebook and Instagram, referring those interested to our well-used and up-to-date website. We also send out a weekly newsletter to our growing mailing list and have illuminated posters on display in our windows and leaflets available at the door.

Summary

This has been an excellent year of consolidation, growth and development in all areas. In spite of our increased outgoings with energy and other costs we managed to create a surplus in 2023. Our centre team continues to develop the skills - both spiritual and managerial - which are needed and our trustees work in harmony overseeing the wider work of the charity.

In addition the number of people using our centre is increasing regularly with an estimated 2,500 visits during the year and an estimated sangha of around 40-50 regulars who attend regularly.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2023

Financial review

The net receipts for the year were £8,676, all relating to unrestricted funds.

Reserves policy

The charity's free reserves, at the year end were £25,207.

A 'winding up' reserve of £15,000 (plus £4,550 rent bond and £4,550 advance rent payments) should be ring-fenced.

We should also work towards having at least £15,000 in the current account on each quarter day before the rent goes out.

Once these commitments have been met, any surplus funds should be allocated to a Centre Development Fund.

Approved by the board of trustees on 31st May 2024

Signed:  (Trustee)

Name: Mark Jones

Triratna Buddhist Community (York)
Independent examiner's report to the trustees of Triratna Buddhist Community (York)

I report to the charity trustees on my examination of the accounts of the CIO for the year ended 31 December 2023, which are set out on pages 9 to 12.

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO's accounts as carried out under section 145 of the 2011 Act. 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 giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 130 of the Charities Act;
- 2 the accounts do not accord with those records.

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: 

Name: Sarah Coates MAAT

21/05/2024

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Triratna Buddhist Community (York)
Receipts and payments account
for the year ended 31 December 2023

	Notes	2023	2022
		Total funds £	Total funds £
Receipts			
Grants and donations	(2)	26,840	22,250
Shop sales		1,562	788
Other income		241	117
Gift aid		6,330	3,395
Courses		3,482	1,571
Retreats		6,821	7,666
Fundraising		1,224	144
Loan		-	20,000
Total receipts		<u>46,500</u>	<u>55,931</u>
Payments			
Marketing and publicity		524	152
Books, resources and stock		1,558	470
Accountancy and independent examination		554	533
Rent, rates and room hire		19,652	19,848
Retreat costs		3,242	2,975
Legal and professional		57	7,689
Training		711	100
Printing, postage and stationery		-	393
IT software and consumables		862	525
Furniture and equipment		15	660
Bank charges		603	572
Utilities		3,311	1,587
Insurance		1,243	1,017
Sundry		860	390
Donations to ECA		1,350	1,250
Telephone		370	526
New premises costs		691	28,288
Other donations		307	-
Loan repayment		1,400	-
Travel		46	-
Speaker fees		468	-
Total payments		<u>37,824</u>	<u>66,975</u>
Net receipts / (payments)		8,676	(11,044)
Fund balances brought forward		16,531	27,575
Fund balances carried forward	(3)	<u>25,207</u>	<u>16,531</u>

Triratna Buddhist Community (York)
Statement of assets and liabilities
as at 31 December 2023

	2023	2022
	Total	Total
	£	£
Cash funds		
Cash at bank	25,137	16,474
Cash in hand	70	57
Total cash funds	<u>25,207</u>	<u>16,531</u>
Debtors and prepayments	2023	
	£	
Prepayments	572	
	<u>572</u>	
Assets retained for the charity's own use		
21 x stackable chairs		
HP laptop		
Wooden framed stackable reception armchairs		
Screens		
Ikea furniture		
Liabilities	2023	
	£	
Loans repayable within one year	4,339	
Loans repayable after one year	15,186	
Accruals	627	
	<u>20,152</u>	

The financial statements were approved by the board of trustees on 13th MAY 2024

Signed:  (Trustee)

Name: MARK JONES :

Triratna Buddhist Community (York)

Notes to the accounts

for the year ended 31 December 2023

1 Accounting policies

Basis of accounting

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

Taxation

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

Triratna Buddhist Community (York)
Notes to the accounts continued
for the year ended 31 December 2023

2 Grants and donations	2023	2023	2023	2022
	Unrestricted funds £	Restricted funds £	Total funds £	Total funds £
European Chairs Assembly Grant	-	-	-	2,980
Dana - General Donations	449	-	449	3,297
Dana - Newcomers	1,862	-	1,862	650
Dana - Recurring Payment	976	-	976	1,872
Dana - Meditations	1,965	-	1,965	486
Dana - Standing Orders	18,492	-	18,492	12,906
Dana - Study	125	-	125	59
Dana- Mindful movement	200	-	200	-
Dana- Practice night	2,771	-	2,771	-
	<u>26,840</u>	<u>-</u>	<u>26,840</u>	<u>22,250</u>

3 Trustee expenses

No trustee received any expenses during this year or the previous year.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this or the previous year.

4 Funds held as agent	Balance b/f £	Incoming £	Outgoing £	Balance c/f £
Scarborough Buddhist group	<u>10</u>	<u>1,425</u>	<u>1,280</u>	<u>155</u>
	<u>10</u>	<u>1,425</u>	<u>1,280</u>	<u>155</u>

Fund name

Scarborough Buddhist group

Additional information

We are administering funds for the Scarborough Buddhist group until they can get a bank account set up.

TRIRATNA BUDDHIST COMMUNITY (YORK)

England & Wales - Charity number 1189773

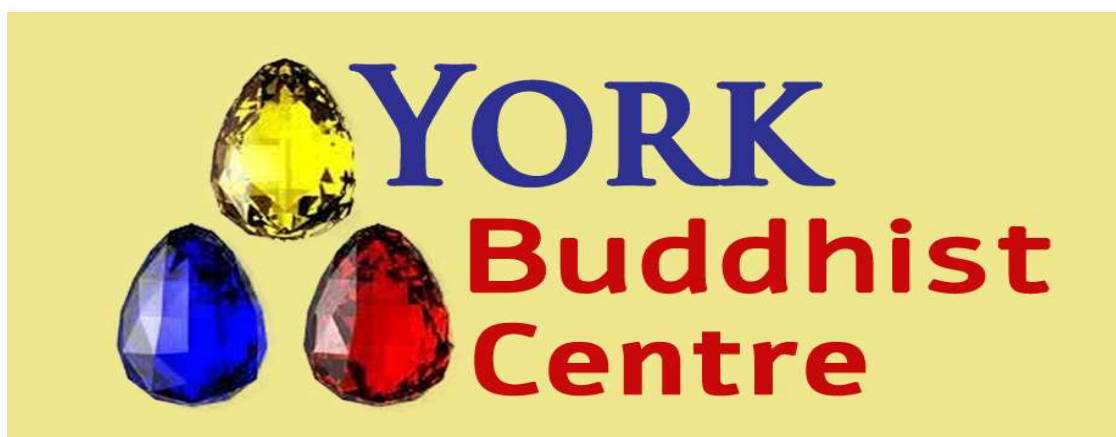
Accounts

Triratna Buddhist Community (York)

Charity number 1189773

Annual Report and Financial Statements

for the year ended 31 December 2022



West Yorkshire Community Accounting Service

Triratna Buddhist Community (York)

Annual Report and Financial Statements for the year ended 31 December 2022

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Receipts and payments account	8
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Prepared by West Yorkshire Community Accountancy Service CIO

Triratna Buddhist Community (York)

Trustees' report for the year ended 31 December 2022

Reference and administrative details of the charity, its trustees and advisors

The trustees during the financial year and up to and including the date the report was approved were:

Name	Position	Dates
Shakyapada Jenny Roberts	Chair	
Mark Jones	Treasurer	
Kathryn Readman		
Mark James Leech		
Frances Irene Hooker		
Robert Burdett		Resigned 25 April 2022
Charity number	1189773	Registered in England and Wales
Registered and principal address	Bankers	
17 Walmgate	Triodos Bank plc	
York	Deanery Road	
YO1 9TX	Bristol BS1 5AS	

Independent examiner

Sarah Coates MAAT

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a Charitable Incorporated Organisation (CIO) association formed on 3 June 2020 and is governed by a constitution.

Method of recruitment and appointment of trustees

The trustees of the charity are appointed by the members at the AGM.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2022

Objectives and activities

The charity's objects

The object of the CIO is to support the advancement of the Buddhist religion, in particular by:

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the council of the CIO.

Maintaining close communication with and working under the guidance of the Triratna Buddhist order and in co-operation with other groups with the same objects.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

We are here to support people who wish to learn about and practise Buddhism. In order to achieve this we provide courses and classes which explore Buddhist practice. These include teaching basic meditation techniques to complete beginners, and more advanced classes and courses for those who want a deeper understanding of Buddhist practice and how this can be explored in contemporary society. We have a small Spiritual and Gift shop to provide access to meditation accessories, etc. and Buddhist literature not easily available elsewhere. All the work and teaching at our Centre, including the shop, is carried out by volunteers. No one is paid. We raise money from donations at the classes and events and from members of the Sangha (community). We aim to promote the Buddhist ethic of 'dana' or giving, so most of our activities are paid for by donation. People are free to attend even if they have no money. We have a commitment to making our activities and premises accessible to all by providing access for disabled people.

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At the moment we do not support anyone. However, this may be necessary in the future as we grow, The contribution made by members of the Triratna Buddhist Order remains essential to provide the experience, depth of practice and understanding of Buddhism needed in a spiritual community, and to make this available to others.

Maintaining close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects;

Public benefit statement

We work in co-operation with other Triratna Centres, Retreat Centres and with the Preceptors College (which oversees the Ordination process). This allows us to maintain clarity with regard to our vision, to benefit from the experience of other groups with similar objectives, and so make the best use of the resources we have in York.

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Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2022

Objectives and activities (continued)

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Positive formulation:

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In setting our objectives and planning our activities the Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the advancement of religion, encouraging members and others to live ethical lives in accordance with the teachings of the Buddha and, through those teachings, promoting the health and well-being of all.

Introduction - New Premises and More Classes

This has been an important year for our charity. Our proposed acquisition of leased premises on Piccadilly fell through owing to a clause in the head lease which forbade change of use. However new leased premises of 840 square feet were found at 17 Walmgate, in central York.

These were acquired at the beginning of June after planning change of use was approved and, following refurbishment, were occupied in late July. Although the new premises involved a large rise in rent (the previous premises had been rent-free) it was felt that the position and increased size of the new centre would enable us to increase our offering, and therefore our income, substantially.

The increased space and more central location has, in fact, enabled us to increase our activities during the autumn with more classes, and drop-in events - and also helped us to reach more people who might benefit from our centre. We see this trend continuing in 2023 with a substantial increase in people benefitting from what we offer and a substantial increase in income.

In addition, after the move, we were able to increase the size of our volunteer Centre Team which helps us to be better organised in terms of the effective management of the centre.

The lease on our old centre at 38 Gillygate was surrendered at the end of July when all activities etc were transferred to 17 Walmgate.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2022

Achievements and performance (continued)

New Members of the Triratna Order at York

This year we celebrated the Ordination of two of our team: Kate Readman became Amalasarā, and Alex Carr-Malcolm became Maitrikirana. This means that we now have three Order members on the team in York.

A Culture based on Generosity

We run a dana (generosity) economy at York. Everyone involved in running the centre is a volunteer and we make no charges for any of our classes. We do charge a small registration fee for our retreats and courses but otherwise all income is derived from donations.

Each year we also support the European Chairs Assembly with a donation to assist them with the funding of various services from which we and other centres benefit. This year it was £750. We hope to increase this donation next year to around 5% of our income.

Achievements and performance

A programme of classes, courses, retreats, drop-ins, study and other events have been made available during the year. Because of Covid some of these were held online with Zoom until the end of January. After that all activities became in-person with sangha night offering a Zoom link as well.

Mitra Ceremony:

Three of our sangha became Mitras on the evening of 7th September in our new centre. Currently we have 18 active mitras ('friends'). These are community members who are Buddhists, have undertaken to follow the five Precepts as best they can and are committed to practising with Triratna, at least for the time being.

Training for Ordination

Four Women and one man asked to 'Join the Order' this year which means that they will embark on a programme of training retreats and mentoring, with a view to deepening their practice, so that they may eventually be invited to join the Triratna Buddhist Order. We now have nine sangha members who have asked for ordination.

Sangha (community) nights continued to be held on Wednesday evenings, and covered a broad range of the Buddha's teaching together with meditation practice. Initially they were on Zoom but on 22nd February reverted to in-person with a Zoom option. This has continued during the rest of the year with the Zoom attendance dwindling to between 1 and 3 people each week as in-person numbers increased to between 10 and 20 each week. These evenings are mainly led by Shakyapada, Mark Jones and Amalasarā with occasional visits from outside Order members. They always include both meditation and teaching.

Study Groups: There have been three study groups this year on Monday and Thursday evenings. These were held on Zoom in the early part of the year but became in-person after February. Each of these is part of the four-year Triratna Mitra Training Course which gives a comprehensive overview of the Triratna presentation of Buddhism.

Students from Year Two onwards are required to be Mitras (i.e. they regard themselves as Buddhists, follow the Five Precepts and are committed to practising with Triratna for the time being). Years Two and Three are led by Shakyapada.

These groups run continuously for most of the year with breaks between modules. A new class of nine students began Year One study in October with Mark Jones facilitating.

Day Retreats. We have held four Day Retreats this year. Taravandana from Manchester (our centre's kalyana mitra or spiritual friend) led two day retreats at our Gillygate Centre. In the autumn there were two day retreats - one with Amalasarā and Shakyapada and a second with Taravandana.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2022

Achievements and performance (continued)

Grand Opening of York Buddhist Centre

The new centre was officially opened on the 8th October by Taravandana. Four of our Trustees led the day which also included rituals to confirm Shakyapada as Chair and Taravandana as Kalyana Mitra (friend to the centre). Twenty-six people attended.

Introductory Courses in the early part of the year we ran two introductory courses on Zoom, each over four nights. From 1st June we incorporated a newcomer's course into our regular in-person sangha night for two months. This was well attended and resulted in several new people joining the sangha. A further introductory course over six Tuesday evenings was held at the new centre in September, attended by around twenty people and was followed by a second, and different, introductory course in November which attracted twelve people.

Meditation Drop-ins

Saturday morning introductory sessions were introduced from 2nd April with different themes each week but were not well-attended so, from May onwards, became meditation mornings attracting up to fifteen people each week until they broke for the summer at the end of July. They began again at the new centre in September and have continued to be popular with between 8 and 17 people attending. Numbers are growing as more people join us on a regular basis.

In October we also began five weekday drop-in meditation sessions each week - three at 12 noon on Monday, Wednesday and Thursday lunchtimes and two at 6.00pm on Mondays and Thursdays. Attendance fluctuates but after a slow start, these are proving popular with up to six people attending at times. A regular meditation community is developing around these classes.

Residential Weekend Retreats. We ran two weekend residential retreats in 2022 at the Beamsley Project, near Skipton. The first retreat in March was led by Padmasimha and Pramudita, two Order members from Cardiff. Eighteen sangha members attended. The second retreat took place in September and was led by Amalasarā, Mark Jones and Shakyapada. Twenty people attended.

Centre Shop

We have reduced stock considerably due to lack of display space but will be increasing our stock of books about Buddhism and related matters.

Library. We have a substantial library of Buddhist books in the Centre so that they are available to everyone without the need to buy. Anyone can borrow a book / books for a month at a time. There is no charge but we suggest a £1 donation per book borrowed to cover replacement costs.

Meditations via Facebook and YouTube. An archive of 450 of meditations, recorded live during the Covid pandemic, remain available on both Facebook and YouTube and continue to be used by our sangha and members of the public.

Publicity

We publicise all our events through a weekly e-newsletter, and through social media - mainly Facebook - and via our website at www.yorkbuddhistcentre.org.

Since we moved we have also been able to advertise events with two A1 size illuminated posters in our window and an outside box containing leaflets.

Financial review

The net payments for the year was £11,044.

Reserves policy

The charity's free reserves, at the year end were £16,531.

Reserves of £10,000 to be retained. As of January 2023, it was agreed that these should be invested in an interest-bearing savings account. Ecology Building Society has been selected as the most appropriate investment and the account is being set up at the moment.

Approved by the board of trustees on 21st August 2023

Signed:  (Trustee)

Name: MARK JONES

Triratna Buddhist Community (York)
Independent examiner's report to the trustees of Triratna Buddhist Community (York)

I report to the charity trustees on my examination of the accounts of the CIO for the year ended 31 December 2022, which are set out on pages 8 to 11.

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO's accounts as carried out under section 145 of the 2011 Act. 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 giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 130 of the Charities Act;
- 2 the accounts do not accord with those records.

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: 

Name: Sarah Coates MAAT

21/08/2023

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Triratna Buddhist Community (York)
Receipts and payments account
for the year ended 31 December 2022

	Notes	2022	2022	2022	2021
		Unrestricted funds	Restricted funds	Total funds	Total funds
		£	£	£	£
Receipts					
Grants and donations	(2)	19,270	2,980	22,250	14,850
Shop sales		788	-	788	7,427
Other income		117	-	117	7
Gift aid		3,395	-	3,395	3,159
Courses		1,571	-	1,571	273
Retreats		7,666	-	7,666	1,469
Fundraising		144	-	144	1,350
Loan		20,000	-	20,000	-
Total receipts		52,951	2,980	55,931	28,535
Payments					
Marketing and publicity		152	-	152	241
Books, resources and stock		470	-	470	5,151
Accountancy and independent examination		533	-	533	450
Travel and subsistence		-	-	-	14
Rent, rates and room hire		19,848	-	19,848	808
Retreat costs		2,975	-	2,975	467
Legal and professional		7,689	-	7,689	2,868
Training		100	-	100	-
Printing, postage and stationery		393	-	393	24
IT software and consumables		525	-	525	425
Furniture and equipment		660	-	660	(467)
Bank charges		572	-	572	328
Utilities		1,587	-	1,587	574
Insurance		1,017	-	1,017	588
Centre refurbishment and decoration		-	-	-	918
Sundry		390	-	390	297
Donations to ECA		1,250	-	1,250	310
Telephone		526	-	526	441
New premises costs		25,308	2,980	28,288	-
Total payments		63,995	2,980	66,975	13,437
Net receipts / (payments)		(11,044)	-	(11,044)	15,098
Transfers between funds		-	-	-	-
Net movement in funds		(11,044)	-	(11,044)	15,098
Fund balances brought forward		27,575	-	27,575	12,477
Fund balances carried forward	(3)	16,531	-	16,531	27,575

Triratna Buddhist Community (York)
Statement of assets and liabilities
as at 31 December 2022

	2022	2022	2022	2021
	Unrestricted	Restricted	Total	Total
	£	£	£	£
Cash funds				
Cash at bank	16,474	-	16,474	27,444
Cash in hand	57	-	57	131
Total cash funds	<u>16,531</u>	<u>-</u>	<u>16,531</u>	<u>27,575</u>

Debtors and prepayments	2022
	£
Prepayments	524
	<u>524</u>

Other assets	2022
	£
Rent bond	4,550
	<u>4,550</u>

Assets retained for the charity's own use
 21 x stackable chairs
 HP laptop
 Wooden framed stackable reception armchairs
 Screens
 Ikea furniture

Liabilities	2022
	£
Loans repayable within one year	2,351
Loans repayable after one year	18,000
Accruals	360
	<u>20,711</u>

The financial statements were approved by the board of trustees on 21st August 2023

Signed: Mark Jones (Trustee)

Name: MARK JONES

Triratna Buddhist Community (York)

Notes to the accounts continued

for the year ended 31 December 2022

1 Accounting

Basis of accounting

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

Taxation

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

2 Grants and donations

	2022	2022	2022	2021
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
European Chairs Assembly Grant	-	2,980	2,980	-
Dana - General Donations	3,297	-	3,297	3,188
Dana - Newcomers	650	-	650	355
Dana - Recurring Payment	1,872	-	1,872	4,456
Dana - Meditations	486	-	486	-
Dana - Standing Orders	12,906	-	12,906	6,591
Dana - Study	59	-	59	221
Dana - New Central Appeal	-	-	-	39
	<u>19,270</u>	<u>2,980</u>	<u>22,250</u>	<u>14,850</u>

3 Restricted funds

	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
European Chairs Assembly Grant	<u>-</u>	<u>2,980</u>	<u>2,980</u>	<u>-</u>	<u>-</u>
	<u>-</u>	<u>2,980</u>	<u>2,980</u>	<u>-</u>	<u>-</u>

Fund name

Purpose of restriction

European Chairs Assembly Grant To purchase furniture for the new centre.

Triratna Buddhist Community (York)
Notes to the accounts continued
for the year ended 31 December 2022

Trustee expenses

No trustee received any expenses during this year or the previous year.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this or the previous year.

Funds held as agent	Balance b/f £	Incoming £	Outgoing £	Balance c/f £
Scarborough Buddhist group	-	10	-	10
	<u>-</u>	<u>10</u>	<u>-</u>	<u>10</u>

Fund name

Scarborough Buddhist group

Additional information

We are administering funds for the Scarborough Buddhist group until they can get a bank account set up.

TRIRATNA BUDDHIST COMMUNITY (YORK)

England & Wales - Charity number 1189773

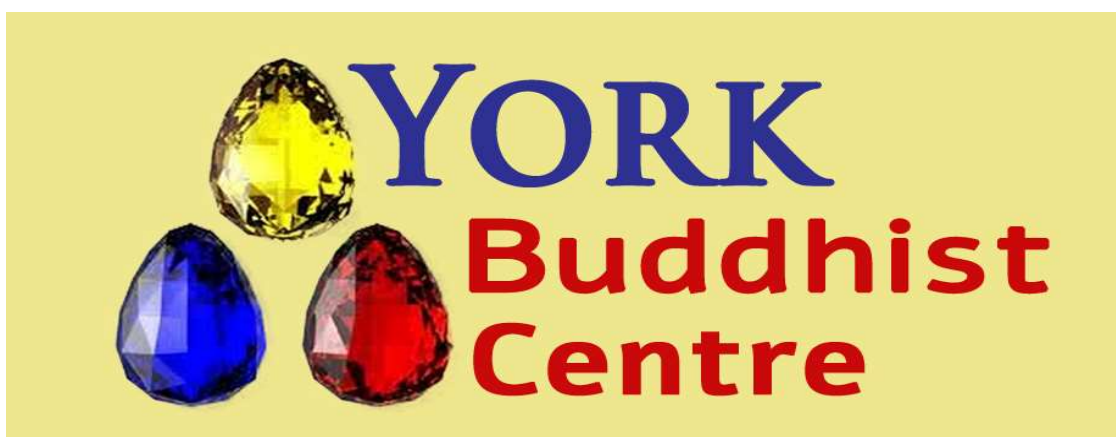
Accounts

Triratna Buddhist Community (York)

Charity number 1189773

Annual Report and Financial Statements

for the year ended 31 December 2021



West Yorkshire Community Accounting Service

Triratna Buddhist Community (York)

Annual Report and Financial Statements for the year ended 31 December 2021

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Notes to the accounts	10

Prepared by West Yorkshire Community Accountancy Service CIO

Triratna Buddhist Community (York)

Trustees' report for the year ended 31 December 2021

Reference and administrative details of the charity, its trustees and advisors

The trustees during the financial year and up to and including the date the report was approved were:

Name	Position	Dates
Shakyapada Jenny Roberts	Chair	
Mark Jones	Treasurer	
Kathryn Readman		
Mark James Leech		
Frances Irene Hooker		
Robert Burdett		

Charity number 1189773 Registered in England and Wales

Principal address

38 Gillygate
York
YO31 7EQ

Bankers

Triodos Bank plc
Deanery Road
Bristol BS1 5AS

Independent examiner

Sarah Coates MAAT

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a Charitable Incorporated Organisation (CIO) Association formed on 3 Jun 2020.

Method of recruitment and appointment of trustees

The trustees of the charity are appointed by the members at the AGM.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2021

Objectives and activities

The charity's objects

The object of the CIO is to support the advancement of the Buddhist religion, in particular by:

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the council of the CIO.

Maintaining close communication with and working under the guidance of the Triratna Buddhist order and in co-operation with other groups with the same objects.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

We are here to support people who wish to learn about and practise Buddhism. In order to achieve this we provide courses and classes which explore Buddhist practice. These include teaching basic meditation techniques to complete beginners, and more advanced classes and courses for those who want a deeper understanding of Buddhist practice and how this can be explored in contemporary society. We have a small Spiritual and Gift shop to provide access to meditation accessories, etc. and Buddhist literature not easily available elsewhere. All the work and teaching at our Centre, including the shop, is carried out by volunteers. No one is paid. We raise money from donations at the classes and events and from members of the Sangha (community). We aim to promote the Buddhist ethic of 'dana' or giving, so most of our activities are paid for by donation. People are free to attend even if they have no money. We have a commitment to making our activities and premises accessible to all by providing access for disabled people.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the Council of the CIO;

At the moment we do not support anyone. However, this may be necessary in the future as we grow, The contribution made by members of the Triratna Buddhist Order remains essential to provide the experience, depth of practice and understanding of Buddhism needed in a spiritual community, and to make this available to others.

Maintaining close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects;

We work in co-operation with other Triratna Centres, Retreat Centres and with the Preceptors College (which oversees the Ordination process). This allows us to maintain clarity with regard to our vision, to benefit from the experience of other groups with similar objectives, and so make the best use of the resources we have in York.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Triratna Buddhist Community(York) is committed to encouraging equality, diversity and inclusion among our sangha, and eliminating discrimination. Everyone is welcome regardless of age, disability, gender, race, religion or belief, income, sex and sexual orientation. People attending our classes or events classes do not have to be a Buddhist or feel the need to become a Buddhist.

Specifically, we do this by:

- a. Holding services of worship and devotion;
- b. Organising talks, courses, classes meditation sessions and retreats;
- c. Publishing materials (written and online);
- d. Raising funds and invite and receive contributions.

Our aim is to encourage members and others to live ethical lives in accordance with the teachings of the Buddha. So, the Triratna Buddhist Community (York) provides an understanding of Buddhism through a programme of classes and events, both for regular members of our group as well as for newcomers from the local community and others.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2021

Objectives and activities (Continued)

One of the main aspects of the Buddha's teaching is a grounding in Buddhist ethics. These ethical values are central to, and are threads that run through all the Buddha's teachings. Non-Buddhists are in no way expected or required to take on or follow these precepts. Instead, they are invited to test the ethical principles in their own lives to determine their effects on themselves and others around them, for the enhancement and benefit of society as a whole.

These ethical values are expressed in both a positive and negative form in what are called The Five Precepts:

Negative formulation:

- I undertake to abstain from taking life.
- I undertake to abstain from taking the not-given.
- I undertake to abstain from sexual misconduct.
- I undertake to abstain from false speech.
- I undertake to abstain from taking intoxicants.

Positive formulation:

- With deeds of loving kindness, I purify my body.
- With open-handed generosity, I purify my body.
- With stillness, simplicity, and contentment, I purify my body.
- With truthful communication, I purify my speech.
- With mindfulness clear and radiant, I purify my mind.

The charity's main activities

We are a community of friends who support the Buddhist religion in York mainly through our Centre and online. Our activities encourage members and others to live ethical lives in accordance with the teachings of the Buddha. We use applications of the Buddha's teaching to promote the health and well-being of all through classes and courses and other means.

Public benefit statement

In setting our objectives and planning our activities the Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the advancement of religion, encouraging members and others to live ethical lives in accordance with the teachings of the Buddha and, through those teachings, promoting the health and well-being of all.

Achievements and performance

A programme of classes and events has been available during the year. Because of Covid most of these were held online with Zoom until 1st June 2021 when limited numbers were allowed in the Centre for our Sangha Night (community night) with the rest of our sangha attending online as normal. After restrictions were relaxed the centre was opened up completely for during September, October November and early December when events were sometimes hybrid (some people on Zoom, some in-person). We closed again in mid-December when the Omicron variant was starting to spread rapidly.

In this way we have been continuing with all our usual activities:

Sangha (community) nights are held on Wednesday evenings, covering a broad range of the Buddha's teaching together with a period of meditation. These have been attended by between eight and twenty sangha members during the year. These are mainly led by Shakyapada, Mark Jones and Kate Readman with occasional visits from outside Order members.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2021

Achievements and performance (continued)

Study Groups: Two separate study groups up until July 2021 and three study groups from September 2021 on Monday, Tuesday and Thursday Evenings. Each of these is following part of the four-year Triratna Mitra Training Course which gives a comprehensive overview of the Triratna presentation of Buddhism, These groups run continuously for most of the year with breaks between modules. Normally students in Year Two are required to be Mitras (i.e. they regard themselves as Buddhists, follow the Five Precepts and are committed to practising with Triratna for the time being). These were led by Shakyapada, Mark Jones and Kate Readman.

Mitra Ceremony: Two of our sangha became Mitras on the evening of 3rd August at an in-person event at St Olave's Church hall which was hired for the evening. The event was led by Kate Readman and Shakyapada.

Live Meditations via Facebook and YouTube: The early morning meditations which we started in the first lockdown continued to run every weekday from January through to the end of October this year when they ended. However an archive of 450 of these meditations remains available on both media outlets and are still being used by our sangha and members of the public. These each last around thirty-five minutes and each of the live ones was attended by between eight and thirty people. We believe that these sessions have been really helpful to people living their lives under restrictions and many of the morning meditators have gone on to join one of our Introduction to Buddhism Courses. Some have also joined our regular community and enjoyed other activities with us. These sessions were led by Shakyapada, Sanghaketu, Kate Readman, Alex Carr-Malcolm and Jo McVey.

Day Retreats: We have held three Day Retreats this year. One in March on Zoom with Taravandana attended by twelve people, one in October at our Centre led by Punyamala, attended by eleven people and the other on Sangha Day in November at St Olave's Hall, led by Mahasraddha and Shakyapada and attended by 12 people.

Residential Weekend Retreats: Normally we run two weekend residential retreats each year, but this year, because of Covid, it was only possible to run one in September. This was at the Beamsley Project, near Skipton on the theme of 'Inviting our Demons to Tea'. It was led by Shakyapada and Taravandana and was attended by 17 people.

Another special Weekend Retreat was held at our Adhithana Meditation Centre near Hereford in July when eleven of our community practised there over one weekend and ritually marked our community opening a centre. This was led by Shakyapada, with help from the sangha and members of the Adhithana Community.

Introductory Courses: This year we have run two four week introductory courses on Zoom, in January, led by Mark Jones and Kate Readman and May, led by Shakyapada and Jo McVey. These were each attended by around 10 people.

A 'follow-on' course for newcomers on the subject of Buddhist Myth was held online for 7 weeks in February and March, led by Shakyapada and attended by twelve people. An in-person introductory course was held in September/October for six weeks at our centre, led by Shakyapada, Alex Carr-Malcolm and Joan Taylor and was attended by eleven people.

The Buddha's Bazaar: The Centre shop which was established last year was relaunched in April, when restrictions were eased, with more space and more products on offer, including giftware as well as Buddhist artefacts. It opened for three afternoons each week, staffed by volunteers from April to November when it closed in preparation for a proposed move to new premises in the new year. The shop sold goods to the retail value of £7,427. This is on top of sales for the previous year and, even though some stock was sold off at cost price in November, we believe that the shop has made a valuable contribution to our finances. It has also enabled our community to work together and has been a valuable focal point for our sangha during the restrictions earlier in the year. Thanks to Joan Taylor for managing this so well.

Triratna Buddhist Community (York)

Trustees' report (continued) for the year ended 31 December 2021

Achievements and performance (continued)

Support in our Community: During the year our 'Kalyana Mitra' (spiritual friend) Taravandana has met up with those Mitras who are training for Ordination and Shakyapada has also continued to meet up with them and other Mitras and Mitras-to-be to talk about practice and to generally support them. Shakyapada herself has also been well supported with personal contact by Mahasraddha and Khemasuri (two of our trustees) and by other local Order members and others from the movement.

Financial Situation: We have been fortunate this year to have had the benefit of rent-free premises for the whole of the period through the generosity of our chair, Shakyapada. Together with low overheads, a good number of standing orders, regular donations, other donations, gift aid and shop profits this has left us in a very healthy cash position at the end of the year.

In December we opened a second bank account through CAF Bank. This is in addition to our current Triodos Account which has no facility for cash payments. CAF Bank will enable us to pay cash into the account at a Post Office.

Future Plans: We were lucky enough to find some new and much bigger premises in the centre of York last September. These were offered at a low rent but needed fitting out with floors, ceilings, toilets lights and kitchen. In the autumn we obtained quotations amounting to £32,000 for this work which we intended to fund through a six year, £25,000 loan from Windhorse Trust (which is part of the Triratna movement). The balance will come out of our cash reserves and from an appeal to be launched in January 2022.

Newsletter: We publicise all our events through a weekly e-newsletter produced by Jenny Walker, and through social media - mainly Facebook - and via our website at www.yorkbuddhistcentre.org

Library: We have a substantial library of Buddhist books in the Centre so that they are available to everyone without the need to buy. Anyone can borrow a book / books a for a month at a time. There is no charge but we suggest a £1 donation per book borrowed to cover replacement costs.

Finally, although the lockdowns and restrictions have had their difficulties, there has been an upside to the pandemic, in that we have attracted people from beyond York as well as local people. We have discovered new ways of reaching out to more people through Zoom and social media broadcasts. As we, hopefully, return to in-person classes in 2022, we hope to be able to maintain some online access for those who, for whatever reason, find it difficult to travel to our Centre.

Financial review

The net receipts for the year were £15,098, all relating to unrestricted funds.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £27,575.

It is our policy to hold unrestricted reserves of £5,000 which amounts to approximately three months' expenditure as working capital. This is likely to increase to around £10,000 once the Charity moves to larger premises in 2022.

We acknowledge that our current reserves are in excess of our policy limit. However, we are looking to invest a significant amount of this excess into refurbishment of leasehold premises and we anticipate our reserves to be nearer to our policy limit after that work has been completed.

Signed on behalf of the board of trustees on 04/05/2022

Mark Jones (Trustee)



Triratna Buddhist Community (York)

Independent examiner's report to the trustees of Triratna Buddhist Community (York) Charitable Incorporated Organisation ('the CIO')

I report to the charity trustees on my examination of the accounts of the CIO for the year ended 31 December 2021, which are set out on pages 8 to .

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO's accounts as carried out under section 145 of the 2011 Act. 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 giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the CIO as required by section 130 of the Act; or
- 2 the accounts do not accord with those records.

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: 

Name: Sarah Coates MAAT

04/05/2022

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Triratna Buddhist Community (York)
Receipts and payments account
for the year ended 31 December 2021

	Notes	2021	2020
		Total	Total
		funds	funds
		£	£
Receipts			
Grants and donations	(2)	14,850	11,452
Shop sales		7,427	1,540
Other income		7	3
Gift aid		3,159	858
Courses		273	-
Retreats		1,469	-
Fundraising		1,350	-
Income from association		-	11,807
Total receipts		<u>28,535</u>	<u>25,660</u>
Payments			
Marketing and publicity		241	238
Books, resources and stock		5,151	4,795
Accountancy and independent examination		450	-
Travel and subsistence		14	-
Rent, rates and room hire		808	-
Retreat costs		467	-
Legal and professional		2,868	-
Training		-	100
Printing, postage and stationery		24	102
IT software and consumables		425	874
Furniture and equipment		(467)	1,326
Bank charges		328	83
Utilities		574	216
Insurance		588	825
Centre refurbishment and decoration		918	4,288
Sundry		297	132
Donations to ECA		310	-
Telephone		441	204
Total payments		<u>13,437</u>	<u>13,183</u>
Net receipts / (payments)		<u>15,098</u>	<u>12,477</u>
Fund balances brought forward		<u>12,477</u>	<u>-</u>
Fund balances carried forward	(3)	<u>27,575</u>	<u>12,477</u>

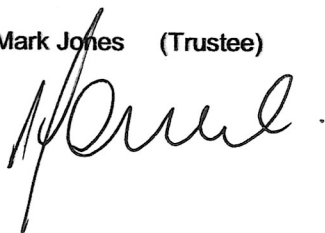
Triratna Buddhist Community (York)
Statement of assets and liabilities
as at 31 December 2021

	2021	2020
	Total	Total
	£	£
Cash funds		
Cash at bank	27,444	12,205
Cash in hand	131	272
Total cash funds	<u>27,575</u>	<u>12,477</u>
Other monetary assets	£	
Prepayments - Insurance	<u>352</u>	
	<u>352</u>	
Assets retained for the charity's own use		
21 x stackable chairs		
HP laptop		
Liabilities	£	
Independent examination	<u>360</u>	
	<u>360</u>	

Approval of the accounts

The financial statements were approved by the board of trustees on 04/05/2022

Mark Jones (Trustee)



Triratna Buddhist Community (York)

Notes to the accounts continued

for the year ended 31 December 2021

1 Accounting policies

Basis of accounting

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

Taxation

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

2 Grants and donations

	2021	2021	2021	2020
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
Triratna Future Dharma Fund	-	-	-	2,000
Dana - General Donations	3,188	-	3,188	1,835
Dana - Newcomers	355	-	355	81
Dana - Recurring Payment	4,456	-	4,456	247
Dana - Standing Orders	6,591	-	6,591	3,982
Dana - Study	221	-	221	55
Dana - New Central Appeal	39	-	39	3,252
	<u>14,850</u>	<u>-</u>	<u>14,850</u>	<u>11,452</u>

3 Related party transactions

Trustee expenses

No trustee received any expenses during this year or the previous year.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this or the previous year.

Other related party transactions

The charity is located in premises owned by one of the trustees - Shakyapada Jenny Roberts. During the year refurbishment costs of £917 were incurred relating to that property. The charity will rent the property at £400 per month but no rental costs were incurred during the accounting period.

TRIRATNA BUDDHIST COMMUNITY (YORK)

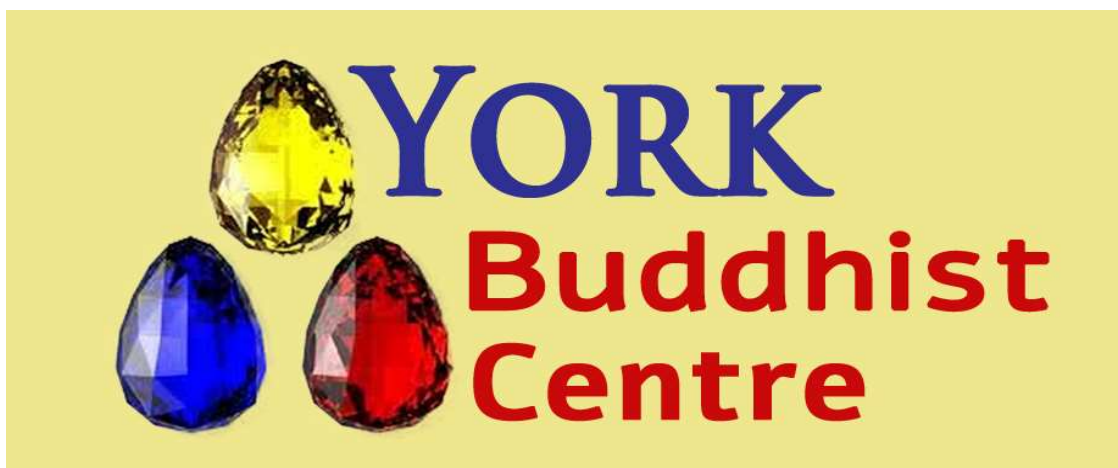
England & Wales - Charity number 1189773

Accounts

Triratna Buddhist Community (York)

Charity number 1189773

Annual Report and Financial Statements for the period 3 June 2020 to 31 December 2020



Triratna Buddhist Community (York)

Annual Report and Financial Statements for the period 3 June 2020 to 31 December 2020

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Prepared by West Yorkshire Community Accounting Service

Triratna Buddhist Community (York)

Trustees' report for the period 3 June 2020 to 31 December 2020

Reference and administrative details of the charity, its trustees and advisors

The trustees during the financial year and up to and including the date the report was approved were:

Name	Position	Dates
Shakyapada Jenny Roberts	Chair	Appointed June 20
Mark Jones	Treasurer	Appointed June 20
Kathryn Readman	Trustee	Appointed June 20
Mark James Leech	Trustee	Appointed June 20
Frances Irene Hooker	Trustee	Appointed June 20
Robert Burdett	Trustee	Appointed June 20

Charity number

The charity was registered with the Charity Commission for England and Wales, number 1189773, on 03 Jun 2020.

Principal address

38 Gillygate
York
YO31 7EQ

Bankers

Triodos Bank plc
Deanery Road
Bristol BS1 5AS

Independent examiner

Simon Bostrom FCIE

West Yorkshire Community Accounting Service

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a Charitable Incorporated Organisation (CIO) formed on 3 Jun 2020.

Method of recruitment and appointment of trustees

The trustees of the charity are appointed by the members at the AGM.

Triratna Buddhist Community (York)

Trustees' report (continued) for the period 3 June 2020 to 31 December 2020

Objectives and activities

The charity's objects

The object of the CIO is to support the advancement of the Buddhist religion, in particular by:

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the council of the CIO.

Maintaining close communication with and working under the guidance of the Triratna Buddhist order and in co-operation with other groups with the same objects.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Encouraging members and others to live ethical lives in accordance with the teachings of the Buddha.

We are here to support people who wish to learn about and practise Buddhism. In order to achieve this we provide courses and classes which explore Buddhist practice. These include teaching basic meditation techniques to complete beginners, and more advanced classes and courses for those who want a deeper understanding of Buddhist practice and how this can be explored in contemporary society. We have a small Spiritual and Gift shop to provide access to meditation accessories, etc. and Buddhist literature not easily available elsewhere. All the work and teaching at our Centre, including the shop, is carried out by volunteers. No one is paid. We raise money from donations at the classes and events and from members of the Sangha (community). We aim to promote the Buddhist ethic of 'dana' or giving, so most of our activities are paid for by donation. People are free to attend even if they have no money. We have a commitment to making our activities and premises accessible to all by providing access for disabled people.

Supporting ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the Council of the CIO;

At the moment we do not support anyone. However, this may be necessary in the future as we grow, The contribution made by members of the Triratna Buddhist Order remains essential to provide the experience, depth of practice and understanding of Buddhism needed in a spiritual community, and to make this available to others.

Maintaining close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects;

We work in co-operation with other Triratna Centres, Retreat Centres and with the Preceptors College (which oversees the Ordination process). This allows us to maintain clarity with regard to our vision, to benefit from the experience of other groups with similar objectives, and so make the best use of the resources we have in York.

Using applications of the Buddha's teaching to promote the health and well-being of all.

Triratna Buddhist Community(York) is committed to encouraging equality, diversity and inclusion among our sangha, and eliminating discrimination. Everyone is welcome regardless of age, disability, gender, race, religion or belief, income, sex and sexual orientation. People attending our classes or events classes do not have to be a Buddhist or feel the need to become a Buddhist.

Specifically, we do this by:

- a. Holding services of worship and devotion;
- b. Organising talks, courses, classes meditation sessions and retreats;
- c. Publishing materials (written and online);
- d. Raising funds and invite and receive contributions.

Our aim is to encourage members and others to live ethical lives in accordance with the teachings of the Buddha. So, the Triratna Buddhist Community (York) provides an understanding of Buddhism through a programme of classes and events, both for regular members of our group as well as for newcomers from the local community and others.

Triratna Buddhist Community (York)

Trustees' report (continued) for the period 3 June 2020 to 31 December 2020

Objectives and activities (Continued)

One of the main aspects of the Buddha's teaching is a grounding in Buddhist ethics. These ethical values are central to, and are threads that run through all the Buddha's teachings. Non-Buddhists are in no way expected or required to take on or follow these precepts. Instead, they are invited to test the ethical principles in their own lives to determine their effects on themselves and others around them, for the enhancement and benefit of society as a whole.

These ethical values are expressed in both a positive and negative form in what are called The Five Precepts:

Negative formulation:

- I undertake to abstain from taking life.
- I undertake to abstain from taking the not-given.
- I undertake to abstain from sexual misconduct.
- I undertake to abstain from false speech.
- I undertake to abstain from taking intoxicants.

Positive formulation:

- With deeds of loving kindness, I purify my body.
- With open-handed generosity, I purify my body.
- With stillness, simplicity, and contentment, I purify my body.
- With truthful communication, I purify my speech.
- With mindfulness clear and radiant, I purify my mind.

The charity's main activities

We are a community of friends who support the Buddhist religion in York mainly through our Centre and online. Our activities encourage members and others to live ethical lives in accordance with the teachings of the Buddha. We use applications of the Buddha's teaching to promote the health and well-being of all through classes and courses and other means.

Public benefit statement

In setting our objectives and planning our activities the Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the advancement of religion, encouraging members and others to live ethical lives in accordance with the teachings of the Buddha and, through those teachings, promoting the health and well-being of all.

Achievements and performance

A programme of classes and events has been available during the period. Normally these would be held in-person but, owing to the COVID-19 restrictions, all our activities have been online.

We have continued to run Sangha (community) nights on Zoom every Wednesday evening, throughout this period, covering a broad range of the Buddha's teaching together with a period of meditation. These have been attended by between eight and twenty sangha members.

We have run two separate study groups on Zoom, each of these is following part of the four-year Triratna Mitra Training Course which gives a comprehensive overview of the Triratna presentation of Buddhism: The Year One Group meets on Thursday evenings and the Year Two Group on Tuesday evenings. These have been well attended with nine members on Tuesdays and ten on Thursdays. These groups run for most of the year with breaks between modules.

Normally students in Year Two are required to be Mitras (i.e. they regard themselves as Buddhists, follow the Five Precepts and are committed to practising with Triratna for the time being).

Triratna Buddhist Community (York)

Trustees' report (continued) for the period 3 June 2020 to 31 December 2020

Achievements and performance (Continued)

During the COVID-19 pandemic we have been offering extra meditation sessions each weekday morning live on Facebook and YouTube. These each last around thirty-five minutes and were attended by between eight and thirty people. We believe that these sessions have been really helpful to people living their lives under restrictions and many of the morning meditators have gone on to join one of our Introduction to Buddhism Courses. Some have also joined our regular community and enjoyed other activities with us.

During the first lockdown we also ran a fifteen minute 'Morning Cuppa Meditation' at 11am Tuesday to Friday, which was attended by between eight and fifteen people each day. This was aimed particularly at non-meditators and was an opportunity for them to sit quietly for fifteen minutes. This session ended on 31st July as many of the lockdown restrictions were eased.

During July, August and early September when groups and religious organisations were allowed to meet (with social distancing) we held one hour meditation sessions every fortnight in the open at Museum Gardens at York. They were popular. Numbers varied, but there would usually be between eight and twelve participants, some from our Sangha, some from the online meditations and some complete newcomers.

One of our objects is to promote the Buddha's teaching for the health and well-being of all and we know from feedback received that all these sessions have helped many people to cope with the restrictions of the COVID-19 emergency

On Tuesday 7th July we ran an evening for those who wanted to know what was involved in becoming a Mitra and this was attended by 7 people, three of whom asked to become Mitras. Unfortunately it was not possible to hold their ceremony in late September as hoped due to tighter COVID-19 restrictions. We hope to perform this ceremony in Summer 2021.

In mid-July, we were able to access what was to become our own small but very welcome Buddhist Centre at 38 Gillygate, York. We asked for help with decorating and there followed a week in August when around fifteen volunteers descended on the premises and turned it from an empty shell into an attractive place to meet. The cost of fitting it out was substantial so we applied for and received a grant of £2000 from the Triratna Future Dharma Fund. One of the conditions of the grant was that we had to match the grant with another £2000 from supporters. We launched our appeal in early August and by September we had raised over £3000 from very generous local, national and international friends. This amount was enough to enable us to cover all our costs and to fully equip the new Centre.

In late August/early September we successfully completed the fitting out of a small gift/spiritual shop at the front of the Centre. Gillygate is a busy thoroughfare and we wanted to use our space well so that the costs of the centre could be eventually covered by the profit from the shop. The fitting out was paid out of the appeal but we used our own funds to buy around £3000 of stock which included Buddhist figures, meditation stools, yoga accessories, incense and burners, wind chimes, malas, spiritual books and other items. One of our community, someone who has managed a large store, offered to look after the shop and she managed to recruit around eight people each week to serve in two's on Tuesday to Friday afternoons in October. The shop took over £500 that month but had to close in November due to lockdown. It opened again in December from Tuesday to Saturday and again sold over £500 of goods.

Once restrictions are lifted we anticipate sales of over £1000 per month, the profit on which will cover our rent and utilities, leaving our donated funds to accumulated towards renting or maybe buying a much bigger Centre which we will need within the next two years. The lease for the centre was signed on 1st September 2020. The landlord - Shakyapada, who is also a trustee and Chair of the Centre - agreed a monthly rent of £400 per month (half the commercial rate) with the trustees. However, since we opened the Centre all rent has been waived, as we are not able to offer face to face activities and the shop has been closed for much of the time. This rent holiday is set to continue until such time as the Centre and shop are fully operational.

Triratna Buddhist Community (York)

Trustees' report (continued) for the period 3 June 2020 to 31 December 2020

Achievements and performance (Continued)

We ran an Introduction to Buddhism course on four Monday evenings from 21st September. This was smaller than our usual in-house courses (held at the Quaker Centre before we became a charity) but was still attended by eleven very enthusiastic newcomers to Buddhism. This was followed in by our first 'follow-on course' which looked more deeply into Buddhist practice. Around twelve people attended, many from the first course. Some of them are now members of our community.

In October/November a guest Order member from Manchester, Taravandana, a good friend to our Centre, held a course spread over three Monday evenings looking at 'Friendship in the Sangha' which was attended by fifteen people, both regulars and newcomers. Taravandana joined us again on 15th November to lead a Day Retreat entitled 'The Taste of Freedom' which was attended by sixteen people.

We have also encouraged our Sangha members to attend Zoom events and retreats offered by the wider movement and many have taken this opportunity to deepen their practice.

We have publicised our events through a weekly e-newsletter produced by a member of our Sangha, through social media - mainly Facebook - and via our website at www.yorkbuddhistcentre.org

We have also established a substantial library of Buddhist books in the Centre so that they are available to everyone without the need to buy. Anyone can borrow a book / books a for a month at a time. There is no charge but we suggest a £1 donation per book borrowed to cover replacement costs. The library was funded mostly from our income with some donations of books from others.

It has been a busy six months for a small charity but a successful one. Our sangha has grown with an estimated forty to fifty people who attend least one even every few months; this includes a regular core sangha of around thirty people who attend most weeks. For our income we rely on our sangha and people have been very generous in supporting the charity, many making regular monthly donations through standing orders while others prefer to donate on a more ad hoc basis through PayPal.

Finally, although the lockdowns and restrictions have had their difficulties, there has been an upside to the pandemic, in that we have attracted people from beyond York as well as local people. We have discovered new ways of reaching out to more people through Zoom and social media broadcasts. When we return to in-person classes, we hope (subject to a suitable broadband signal) to be able to maintain online access for those who, for whatever reason, find it difficult to travel to our Centre.

Financial review

The net receipts for the period were £12,477.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £12,477.

We have no formal policy at present.

Signed on behalf of the board of trustees:

Signed: Shakyapada

Date: 19/04/2021

Name SHAKYAPADA ROBERTS (Trustee)

Triratna Buddhist Community (York)

Independent examiner's report to the trustees of Triratna Buddhist Community (York) Charitable Incorporated Organisation ('the CIO')

I report to the charity trustees on my examination of the accounts of the CIO for the period 3 June 2020 to 31 December 2020, which are set out on pages 8 to 11.

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO's accounts as carried out under section 145 of the 2011 Act. 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 giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the CIO as required by section 130 of the Act; or
- 2 the accounts do not accord with those records.

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: 

Name: Simon Bostrom

Relevant professional qualification or body: FCIE

Date:5/05/2021.....

West Yorkshire Community Accounting Service

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Triratna Buddhist Community (York)
Receipts and payments account
for the period 3 June 2020 to 31 December 2020

	Notes	2020 Unrestricted funds £	2020 Restricted funds £	2020 Total funds £
Receipts				
Grants and donations	(2)	6,200	5,252	11,452
Shop sales		1,540	-	1,540
Other income		3	-	3
Gift aid		858	-	858
Income from association		11,807	-	11,807
Total receipts		<u>20,408</u>	<u>5,252</u>	<u>25,660</u>
Payments				
Marketing and publicity		238	-	238
Books, resources and stock		4,795	-	4,795
Training		100	-	100
Printing, postage and stationery		102	-	102
IT software and consumables		874	-	874
Furniture and equipment		-	1,326	1,326
Bank charges		83	-	83
Utilities		216	-	216
Insurance		825	-	825
Centre refurbishment and decoration		362	3,926	4,288
Sundry		132	-	132
Telephone		204	-	204
Total payments		<u>7,931</u>	<u>5,252</u>	<u>13,183</u>
Net receipts / (payments)		<u>12,477</u>	<u>-</u>	<u>12,477</u>
Fund balances brought forward		<u>-</u>	<u>-</u>	<u>-</u>
Fund balances carried forward	(3)	<u>12,477</u>	<u>-</u>	<u>12,477</u>

Triratna Buddhist Community (York)

Statement of assets and liabilities

as at 31 December 2020

	2020	2020	2020
	Unrestricted	Restricted	Total
	£	£	£
Cash funds			
Cash at bank	12,205	-	12,205
Cash in hand	<u>272</u>	<u>-</u>	<u>272</u>
Total cash funds	<u>12,477</u>	<u>-</u>	<u>12,477</u>
Other monetary assets			£
Debtors			504
Prepayments - Insurance			551
Stream - water bill			45
Barmley retreat deposit Sept 2021			<u>100</u>
			<u>1,200</u>
Assets retained for the charity's own use			
21 x stackable chairs			
HP laptop			
Liabilities			£
Independent examination			450
Room rental March 2020 - Quaker Society			<u>401</u>
			<u>851</u>

Approval of the accounts

The financial statements were approved by the board of trustees on

Date:19/04/2021.....

Signed:Shakyapada Jenny Roberts..... (Trustee)

Triratna Buddhist Community (York)
Notes to the accounts
for the period 3 June 2020 to 31 December 2020

1 Accounting policies

Basis of accounting

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Triratna Buddhist Community (York)
Notes to the accounts continued
for the period 3 June 2020 to 31 December 2020

2 Grants and donations	2020	2020	2020
	Unrestricted	Restricted	Total
	funds	funds	funds
	£	£	£
Triratna Future Dharma Fund	-	2,000	2,000
Dana - General Donations	1,835	-	1,835
Dana - Newcomers	81	-	81
Dana - Recurring Payment	247	-	247
Dana - Standing Orders	3,982	-	3,982
Dana - Study	55	-	55
Dana - New Central Appeal	-	3,252	3,252
	<u>6,200</u>	<u>5,252</u>	<u>11,452</u>

3 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Refurbishment fund	-	5,252	5,252	-	-
	<u>-</u>	<u>5,252</u>	<u>5,252</u>	<u>-</u>	<u>-</u>

Fund name

Purpose of restriction

Refurbishment fund Funds provided from the Triratna Future Dharma Fund matched by donations raised from an appeal.

4 Related party transactions

Trustee expenses

No trustee received any expenses during this accounting period.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this accounting period.

Other related party transactions

The charity is located in premises owned by one of the trustees - Shakyapada Jenny Roberts. During the year refurbishment costs of £3,591 were incurred relating to that property. The charity will rent the property at £400 per month but no rental costs were incurred during the accounting period due to the Covid 19 restrictions.

There were no other related party transactions.