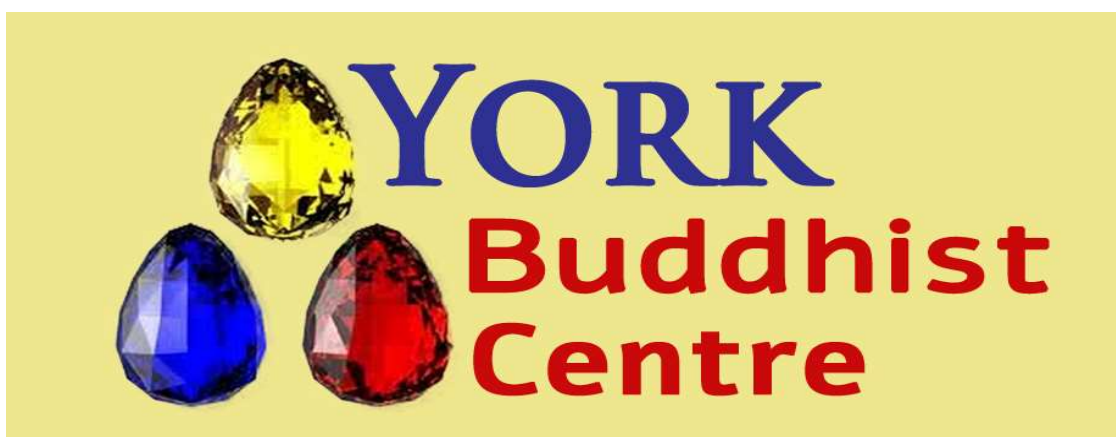


# **Triratna Buddhist Community (York)**

Charity number 1189773

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



# **Triratna Buddhist Community (York)**

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

<b>Contents</b>	<b>Page</b>
Trustees' report	2 to 6
Examiner's report	7
Receipts and payments account	8
Statement of assets and liabilities	9
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:

<b>Name</b>	<b>Position</b>	<b>Dates</b>
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

<b>Principal address</b>	<b>Bankers</b>
38 Gillygate	Triodos Bank plc
York	Deanery Road
YO31 7EQ	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](http://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 Total funds £	2020 Total funds £
<b>Receipts</b>			
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
<b>Total receipts</b>		<b>28,535</b>	<b>25,660</b>
<b>Payments</b>			
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
<b>Total payments</b>		<b>13,437</b>	<b>13,183</b>
<b>Net receipts / (payments)</b>		<b>15,098</b>	<b>12,477</b>
<b>Fund balances brought forward</b>		<b>12,477</b>	<b>-</b>
<b>Fund balances carried forward</b>	(3)	<b>27,575</b>	<b>12,477</b>

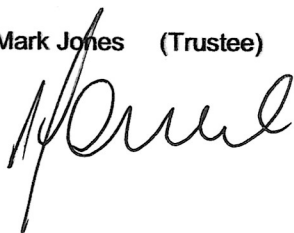
**Triratna Buddhist Community (York)**  
**Statement of assets and liabilities**  
**as at 31 December 2021**

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