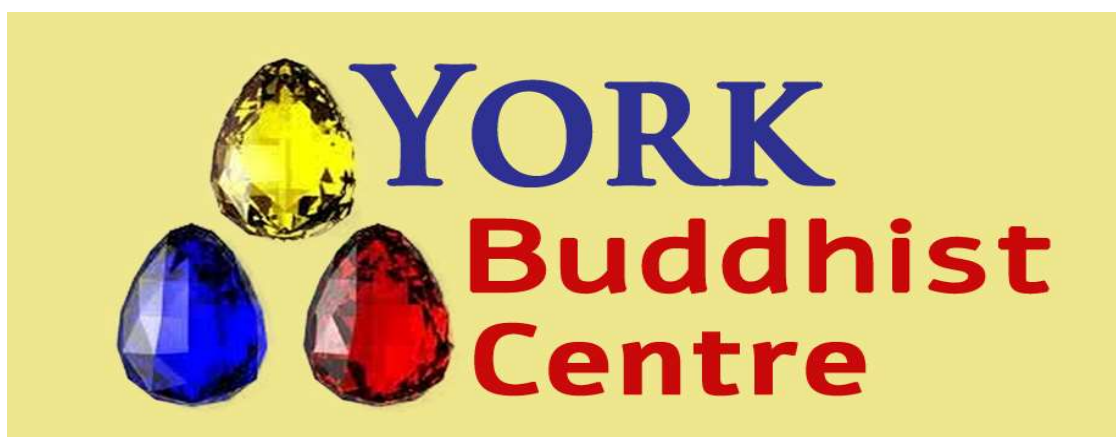


# **Triratna Buddhist Community (York)**

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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**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:

<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		Resigned 25 April 2022
<b>Charity number</b>	1189773	Registered in England and Wales
<b>Registered and principal address</b>	<b>Bankers</b>	
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.

#### **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 2022**

### **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.

### **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 Amalasara, 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 Amalasara 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 Amalasara 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 Amalasara, 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](http://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').

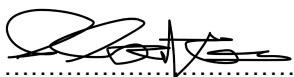
I report in respect of my examination of the CIO's accounts as carried out under section 145 of the 2011 Act. In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

### **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
		£	£	£	£
<b>Receipts</b>					
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	-
<b>Total receipts</b>		<b>52,951</b>	<b>2,980</b>	<b>55,931</b>	<b>28,535</b>
<b>Payments</b>					
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	-
<b>Total payments</b>		<b>63,995</b>	<b>2,980</b>	<b>66,975</b>	<b>13,437</b>
<b>Net receipts / (payments)</b>		<b>(11,044)</b>	<b>-</b>	<b>(11,044)</b>	<b>15,098</b>
<b>Transfers between funds</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net movement in funds</b>		<b>(11,044)</b>	<b>-</b>	<b>(11,044)</b>	<b>15,098</b>
<b>Fund balances brought forward</b>		<b>27,575</b>	<b>-</b>	<b>27,575</b>	<b>12,477</b>
<b>Fund balances carried forward</b>	(3)	<b>16,531</b>	<b>-</b>	<b>16,531</b>	<b>27,575</b>

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

	2022 Unrestricted £	2022 Restricted £	2022 Total £	2021 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	<u>524</u>
	<u>524</u>

Other assets	2022 £
Rent bond	<u>4,550</u>
	<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	<u>360</u>
	<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 Unrestricted funds £	2022 Restricted funds £	2022 Total funds £	2021 Total 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	-	2,980	2,980	-	-
	<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.

<b>Funds held as agent</b>	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.