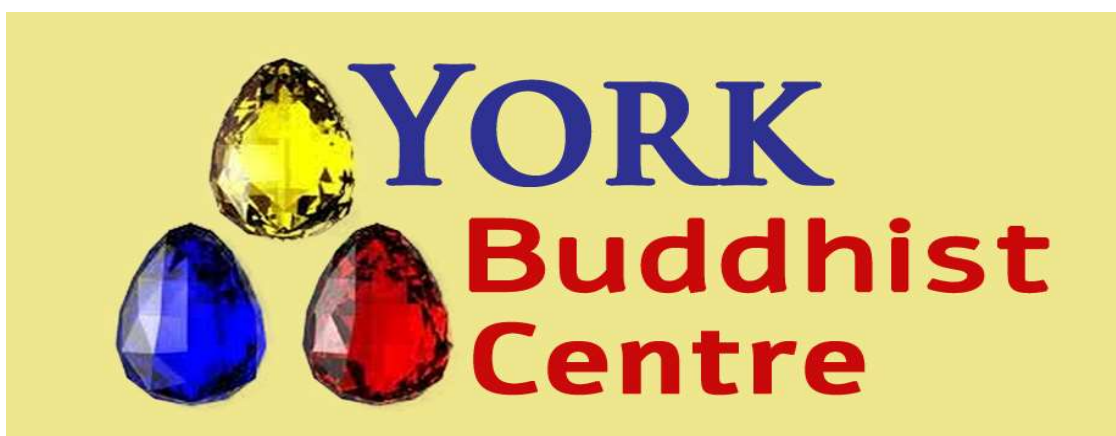


Triratna Buddhist Community (York)

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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Prepared by West Yorkshire Community Accountancy Service CIO

Triratna Buddhist Community (York)

Trustees' report for the year ended 31 December 2023

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		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

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 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 Amalasara 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').

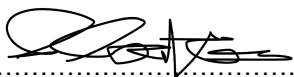
I report in respect of my examination of the CIO's accounts as carried out under section 145 of the 2011 Act. In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

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 Total funds £	2022 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		46,500	55,931
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		37,824	66,975
Net receipts / (payments)		8,676	(11,044)
Fund balances brought forward		16,531	27,575
Fund balances carried forward	(3)	25,207	16,531

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

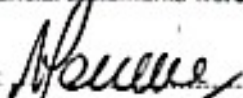
	2023	2022
	Total	Total
	£	£
Cash funds		
Cash at bank	25,137	16,474
Cash in hand	70	57
Total cash funds	<u>25,207</u>	<u>16,531</u>

Debtors and prepayments	2023
	£
Prepayments	<u>572</u>
	<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	<u>627</u>
	<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	Restricted	Total	Total
	funds	funds	funds	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.