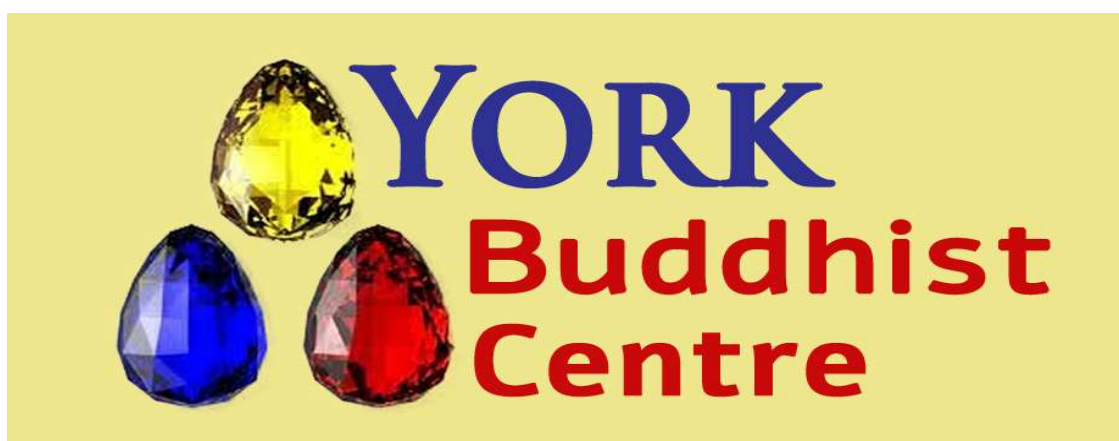


# **Triratna Buddhist Community (York)**

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:

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

### **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**

Amalasara, 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 £
<b>Receipts</b>			
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		-	-
<b>Total receipts</b>		<b>46,379</b>	<b>46,500</b>
<b>Payments</b>			
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		-	-
<b>Total payments</b>		<b>42,407</b>	<b>37,824</b>
<b>Net receipts / (payments)</b>		<b>3,972</b>	<b>8,676</b>
<b>Fund balances brought forward</b>		<b>25,207</b>	<b>16,531</b>
<b>Fund balances carried forward</b>	(3)	<b>29,179</b>	<b>25,207</b>

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

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

<b>Debtors and prepayments</b>	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

<b>Liabilities</b>	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.