

Registered charity number 1190154

Norwich Zen Buddhist Priory

Trustees' Annual Report

**for the period
from 1st April 2023
to 31st March 2024**

Norwich Zen Buddhist Priory
Report of the Board of Trustees
for the period from 1st April 2023 to 31st March 2024

Reference and administration details

Charity name	Norwich Zen Buddhist Priory
Charity's principal address	23 Hellesdon Road Norwich NR6 5EB
Registered charity number	1190154
Date of registration	29 th June 2020
Governing document	Constitution dated 29 th June 2020
Trustees for the charity	Rev. Gillian Frances Houn Leoma Hague (Chair & Secretary) Rev. Mary Caroline Houn Alicia Rowe Mr. Christopher David Loukes (Treasurer) Ms. Christine Mary Yeomans
Accountant	James Gore-Langton FCCA DChA Garth Outertown Stromness Orkney KW16 3JP
Bankers	Lloyds Bank plc Walthamstow Branch PO Box 1000 BX1 1LT

**Norwich Zen Buddhist Priory
Report of the Board of Trustees
for the period from 1st April 2023 to 31st March 2024**

Charity structure, governance and management

Description of the charity's structure

Norwich Zen Buddhist Priory is a charitable incorporated organisation (CIO) governed by a Constitution dated 29th June 2020. It was set up to replace the charitable trust Norwich Buddhist Priory (registered charity number: 1155077). On 1st October 2020, all of the assets of the latter charity were transferred to Norwich Zen Buddhist Priory, to be used for similar purposes to those of the trust.

The charity's trustees are appointed by the body of trustees. All trustees are either members in good standing of the Order of Buddhist Contemplatives or long-term members of the congregation (someone who has taken lay ordination within the Order of Buddhist Contemplatives and has subsequently been associated with the Order for at least five years). The first trustees were four in number and they were: Rev. Leoma Hague (the Prior of Norwich Zen Buddhist Priory), Rev. Saido Kennaway, Christopher Loukes and Christine Yeomans. In March 2023, Rev. Saido Kennaway died and Rev. Alicia Rowe was appointed as a trustee in his place.

Charity history

Norwich Zen Buddhist Priory is a temple of the Order of Buddhist Contemplatives, practising in the Sōtō Zen tradition of Buddhism (also called Serene Reflection Meditation), which originated in China and was transmitted to Japan. It emphasises the practice of meditation (zazen), living by the Buddhist Precepts and acting from the heart of compassion, love and wisdom in one's daily life. In zazen, one sits still in the present moment with an alert and all-accepting mind, allowing feelings and thoughts to arise and fall away naturally, without holding on to them or trying to push them away. Within the Sōtō Zen school there are many teaching lines and each has its own particular flavour. Serene Reflection Meditation is the name used for this practice by those who follow the Sōtō Zen lineage which was brought from Japan by Rev. Master Jiyu-Kennett. She was an English woman who trained at one of the two head temples of the Sōtō Zen Church in Japan. After qualifying as a Master and Teacher she was requested by her western disciples and the Sōtō Zen Church in Japan to spread the teaching in the West. She founded the Order of Buddhist Contemplatives to act as the international administrative and support organisation for the monks and lay ministers practising within the Serene Reflection Meditation tradition.

Over the years, throughout the UK, affiliated local meditation groups have been formed by those who consider themselves members of the lay congregation, to follow the particular forms of practice of the Order. These groups, which hold regular meetings for formal meditation, are a source of mutual help and encouragement and they also serve as a valuable first contact for members of the general public who are interested in our practice. One such group was the Norwich Serene Reflection Meditation Group, which began meeting in the 1980s. The group decided that they would like to establish a centre in Norwich to enable Zen

meditation and Buddhist practice within our tradition to be offered more widely in the East Anglia area. The group began raising funds for this purpose and in 2009 the Norwich Buddhist Priory Trust was formed.

In 2013, the Order agreed to the request of the group to establish a priory in Norwich. It was decided that Rev. Leoma Hague, who had been making regular visits to the Norwich and Cambridge groups for more than three years, would become the Prior. In September 2013, a suitable property was found to rent in Norwich. A few weeks later, the Priory began offering a full schedule of events. In December 2013, Norwich Buddhist Priory became a registered charity. In 2020, it was agreed to change the structure of the charity to become a CIO, so that the charity could purchase property and hold it in its own name. The CIO Norwich Zen Buddhist Priory was registered as a charity on 29th June 2020 and the assets of the trust were transferred to the CIO on 1st October 2020. The charity purchased a property to be its long-term home, at 23 Hellesdon Road, Norwich, NR6 5EB, on 26th March 2021.

Management of the Priory

The Prior is responsible for the day-to-day management of Norwich Zen Buddhist Priory. She consults with the congregation at the Priory's monthly Steering Meetings. The Priory does not have a fixed body of people acting as a steering group, but instead the regular meetings are open to anyone who would like to discuss how the Priory is working.

Meetings of the board of trustees of the charity take place at least twice each year.

Risk management

The trustees have considered major risks to which the charity is potentially exposed and are confident of the existing systems in place to minimise the risks. In particular, insurance cover is in place and the finances of the Priory are kept under regular review. The charity has a written risk management policy which is reviewed at least annually and amended as necessary.

We are aware of the rules protecting children and vulnerable adults from abuse that came into force 12th October 2009 and we continue to review our activities in the light of these. We do not carry out any regulated activities with children or vulnerable adults, as defined by the Safeguarding Vulnerable Groups Act 2006 and amended by the Protection of Freedoms Act 2012. The charity has written safeguarding policies for children and for adults.

The charity has a written health & safety policy which is regularly reviewed and amended if necessary. It also has written policies on anti-fraud, complaints, conflict of interest, data protection, financial controls, investment, political activities, reserves, serious incidents, trustees' expenses and volunteering.

Objectives and activities

The objects of the charity are:

- To advance the Buddhist religion for the public benefit in accordance with the doctrines and principles of the Buddhist faith, in particular the Serene Reflection Meditation school of Buddhism (also known as Sōtō Zen Buddhism).
- To advance the education of the public in the subject of meditation and the teachings of Buddhism, in particular (but not exclusively) by supporting and encouraging the study and practice of Buddhist meditation.

Norwich Zen Buddhist Priory offers Buddhist teaching and practice to everyone. It provides a place where people can practise meditation and it supports them in living within a Buddhist framework, according to Buddhist ethics.

Norwich Zen Buddhist Priory functions within the Order of Buddhist Contemplatives. The Order is self-regulating and ensures that those who are in good standing do not give misleading teaching and are upholding the Buddhist Precepts. The main tenets of the Serene Reflection Meditation School are:

1. The practice of meditation.
2. Keeping the moral Precepts of Buddhism, both in service to others and in our own inner practice.
3. The teaching that all beings have Buddha Nature: all are fundamentally pure, but out of ignorance we create suffering, thereby obscuring our real nature.
4. Awakening the heart of compassion and expressing it through selfless activity.

One of the main ways that Buddhism is spread is by individuals making a personal commitment to practise the Buddhist teachings as best they can. Those who meditate and follow the practice are likely to advance the Buddhist faith through their example, via ordinary contact with others in their daily lives. To help this happen, Norwich Zen Buddhist Priory provides facilities that are open to the public, where the teachings and practice of the Buddhist faith, and especially the Serene Reflection Meditation School, are made available.

Some practical examples of the kind of provision that Norwich Zen Buddhist Priory makes to achieve these objects are as follows:-

- A centre with premises called the Norwich Zen Buddhist Priory, open to anyone interested in learning about Buddhist teaching and meditation and how to put it into practice in their lives. The premises include a meditation room, a quiet place of contemplation. The premises are also a venue for Buddhist ceremonies, retreats, talks/lectures and discussions. The premises are located in a place that is readily accessible for people living in Norwich and the surrounding area. The schedule of regular events at the Priory is advertised on the Priory's website.
- Providing accommodation for a monastic teacher of the Order of Buddhist Contemplatives. In order to advance Buddhism, it is very helpful to have someone who has learnt about it in detail, has been practising it for many years and is qualified

to explain the teaching to others. Norwich Zen Buddhist Priory therefore supports a teacher of the Order of Buddhist Contemplatives. This is a senior qualified priest who has a solid foundation of experience in the spiritual practice of Serene Reflection Meditation and is regulated by a wider order that has rules of conduct. This monastic teacher (the Prior) is based full-time at the Priory and is available to the public to explain and generally advance the religion. As well as providing teaching and spiritual guidance and support to the congregation, the Prior offers traditional Buddhist services including funerals, weddings and naming ceremonies.

- Providing a place for Buddhist retreats. Norwich Zen Buddhist Priory provides the opportunity for regular retreats incorporating Buddhist teaching. This is of great value to all, allowing space and contemplation within the demands of busy lives and the pressures of jobs, families and relationships. By finding a spiritual practice and having the opportunity of spiritual retreat, emotional concerns and spiritual questions can be addressed, allowing for greater peace and harmony. This not only helps the individual but can also have a positive impact on the lives of those around them.
- A wider resource for organisations and individuals to find out about Buddhism. Norwich Zen Buddhist Priory provides a library of Buddhist books and CDs of lectures that people can borrow, as well as leaflets on Buddhist teaching and practice. Besides having the teaching and ceremonial of the Serene Reflection Meditation School available at Norwich Zen Buddhist Priory's premises, the teaching is available on request to schools and other organisations throughout the East Anglia area. Part of the Prior's role is to take up invitations to talk at schools and colleges and to extend whatever help she can to those who wish to deepen their spiritual life. There is a Serene Reflection Meditation Group in Cambridge, which holds regular meetings, and the Prior connects with the group regularly.
- Making events available online, so that people across the country, as well as abroad, are able to take part. All of the events held at Norwich Zen Buddhist Priory are live-streamed via Zoom and anybody who has been introduced to our practice has the option of attending in this way.

In planning the activities of the charity, the trustees have complied with the duty in section 17 of the Charities Act 2011 to have due regard to public benefit, as detailed in guidance published by the Charity Commission, in particular its supplementary guidance on the advancement of religion for the public benefit.

The Priory does not charge a set fee for any teaching, retreat or other event, as we wish to continue the ancient Buddhist practice of not charging for the teaching. Funding is solely by donations from our congregation and visitors. Other offerings besides financial, such as material and practical help, are given by the congregation and much appreciated.

Achievements and performance

Norwich Zen Buddhist Priory has continued to offer a variety of activities that have helped make Buddhist teaching available and also promoted Buddhism through encouraging and facilitating the practice of Serene Reflection Meditation.

The life of the Priory featured a schedule of meditation, ceremonies, teaching and discussion.

We came together online for meditation and morning service at 7.30am for five mornings each week. In order to give people with busy lives plenty of opportunity to come to the Priory, events were scheduled on weekday evenings and at weekends. However, between April and October 2023, there were periods when the Priory had to be closed, for a few days or up to two weeks at a time, due to illness in the Prior's family, and this impacted on the number of events that could be offered.

Norwich Zen Buddhist Priory offered events to both newcomers and experienced practitioners in our congregation. For the former, during the past year, we offered 10 Introductory Afternoons (monthly on a Saturday), where those who were new to our practice could come along to a one-off session for a couple of hours and find out about our tradition. In addition, newcomers could be introduced to our practice before one of our evening meetings. Once people had attended an introductory session, they were welcome to come along to any of the events scheduled at the Priory. During the year, 18 newcomers were introduced to the practice of Serene Reflection Meditation, mostly in person at the Priory, with one having their introduction online.

For the more experienced practitioners in our congregation, the most popular events were the Wednesday Dharma Evenings and the Thursday Evening Meetings, where meditation was followed by a Dharma talk and discussion. On one Saturday a month, we offered a Meditation and Contemplation Day, where people were welcome to come and use the Priory's facilities to have their own retreat for the day. We also held two day retreats, where several meditation periods were interspersed with short ceremonies, a talk and a discussion. On Sunday mornings, the format of the events was to have a meditation period and a ceremony, followed by a discussion. In January 2024, the Prior initiated a Deepening Training Programme, to guide and encourage the practice of longstanding lay practitioners who could commit to a certain level of training at the Priory, whether in person or online.

In addition to the scheduled events, people were welcome to come to the Priory at other times, particularly if they wished to talk with the Prior on a one-to-one basis about how their meditation and practice were going. For much of the year, a garden group met up on Tuesday afternoons, to work together informally to keep the Priory's garden area tidy and well-maintained.

On 5th November 2023, the Priory marked its tenth anniversary, which included a ceremony for our founder, Rev. Master Jiyu-Kennett. On other Sundays during the year, we celebrated the major Buddhist festivals of Wesak (the Festival of the Buddha's Birth) and the Buddha's Enlightenment.

The Prior performed ceremonies requested by members of the congregation, including a lay ordination for two people. She supported the congregation in other ways, most notably by giving spiritual counselling when requested (whether in person or via video call, telephone or email), as well as by making home visits to two congregation members who were unable to attend the Priory. A summer party held in June was a welcome chance to get together and enjoy each other's company in a setting other than the Priory.

The Prior had two online meetings with the meditation group in Cambridge, to meditate with them, give a talk and lead a discussion. A senior monk of the OBC, Rev. Leandra Robertshaw,

who was resident in the Cambridge area, visited the group in person on a regular basis. Meetings of the Cambridge group, whether in person or online, were open to the general public, with two lay ministers being available to introduce newcomers to our practice.

The Priory website, which included a calendar of events, was kept up-to-date. This was the main way by which the general public found out about the Priory. The website included an option to subscribe to our bimonthly newsletter. More detailed information about events was shared through the Priory's email group.

Financial review

Reserves policy

The trustees hold sufficient free reserves to allow the charity to continue to operate during periods of fluctuating income. The level of reserves is calculated by taking a figure of half the charity's typical annual income and adding £6,000 to that amount, to cover replacement of a major asset, giving a figure of £16,000. A review of the amount of reserves required to fulfil the charity's continuing obligations is carried out by the trustees on an annual basis.

On 31st March 2024, the charity had £57,655 cash available. This high level of reserves is considered to be necessary for at least the next year, because some further large expenditure is anticipated for various maintenance projects for the Priory property (including more work on the roof and installing a new boiler). The next year should provide a clearer sense of the impact on the Priory's finances of the recent significant increases in the cost of living and it seems prudent to have a good level of reserves available over this time. If the cash reserves remain high, the charity will pay off another of its short-term loans.

Principal funding sources

The principal source of income for the charity is donations, which is the traditional method of supporting Buddhist activities. No fees are charged for attending any events. Those attending Priory events can make an entirely voluntary donation of an amount that is appropriate to their own circumstances. Bank transfers account for most donations nowadays, with gifts of cash and cheques into the alms bowl tending to be infrequent. Regular support is also given to the temple by those who have kindly taken out a standing order in the charity's favour. Where donors authorise us, we are able to reclaim the tax they have paid on their donations under the current Gift Aid scheme and, in addition, we are able to claim under the Gift Aid Small Donations Scheme.

Members of the congregation, as part of their Buddhist practice, may assist both with the day-to-day running of the Priory and with one-off projects. No salaries are paid by the charity to anyone.

How expenditure has supported the key objectives of the charity

The expenditure of the charity has been in running Norwich Zen Buddhist Priory. As the

presence of a resident monk at the Priory is vital to realising our charitable objects, the Prior is supported by the charity.

Income and expenditure

The total income for the year was £26,044, which was a decrease of just 3% on the figure for the previous year (£27,033). This fall was due to a reduction in donations to £21,045, a decrease of 7% from the previous year's figure (£22,606). Most of this was accounted for by regular income from standing orders dropping by 11%, which is perhaps not surprising given the cost of living challenges faced by donors during the year.

The total expenditure for the year was £27,123, which included repayments of £9,996 on an interest-free loan (given to help with the purchase of the charity's property) that is being repaid in monthly instalments over 24 years, as well as the repayment in full of another interest-free loan of £3,000 (given for the same purpose). When these are excluded, the charity's costs for the year were £14,127, which is 18% more than the comparable figure of £11,960, from the previous year. The charity's food, household and garden expenses rose (by 148%) to £6,577, largely due to a bill for £3,720 for the cutting down of four trees on the property that were dying or endangering the house. Expenditure on premises increased (by 28%) to £2,332, mainly because the fuel bill rose when the charity came off a two-year fixed-rate tariff in May 2023. The equipment and maintenance costs for the year were £2,669 (a decrease of 47%), the main individual expense being some roofing work (£1,340).

Overall, there was an excess of expenditure over income of £1,079 for the year (which was lower than the comparable figure of £9,923 for the previous year). This included a one-off repayment of a £3,000 interest-free loan.

Investment policy and objectives

Our policy is to hold sufficient working capital in our Lloyds Bank Trustee Account (current account) to cover routine day-to-day expenditure. We also have savings in an instant access savings account with Lloyds Bank. We continue to keep this area under review.

The monies held by the charity in the two Lloyds Bank accounts at the end of this year were £57,613 (giving a total of £57,655 when petty cash was included). This was £1,078 less than the total held at the end of the previous financial year.

Other information

It is felt that the financial position of the charity at the balance sheet date (together with donations that will be received during the coming year) will be sufficient to cover the charity's daily running costs and obligations currently existing.

The charity's assets are held for charitable purposes and the trustees have no reason to believe that the current values of the charity's assets are materially different from that shown in the accounts.

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees by:

.....

Gillian Frances Houn Leoma Hague

(Chair of the trustees)

05/08/2024

..... Date

**Independent Examiner's Report
to the trustees of Norwich Zen Buddhist Priory
(charity registration no. 1190154)
for the year ended 31 March 2023**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31st March 2024.

Responsibilities and basis of report

As the charity's trustees 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 charity's accounts carried out under section 145 of the Act and 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 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 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.

James Gore-Langton FCCA DChA

Garth
Outertown
Stromness
KW16 3JP

8 August 2024

Norwich Zen Buddhist Priory

Registered Charity No. 1190154

Receipts and Payments Account

for the year ended 31 March 2024

	Note	2024 £	2023 £
Receipts			
Donations		21,045	22,606
Tax reclaimed		4,562	4,349
Bank interest		437	78
Total receipts		<u>26,044</u>	<u>27,033</u>
Payments			
<i>Charitable expenditure</i>			
Food, household and garden		6,577	2,654
Premises		2,332	1,826
Office and computer		522	500
Telephone/broadband		552	550
Insurance		1,113	1,053
Sacristy		103	91
Library and missionary		259	259
Equipment and maintenance		2,669	5,026
Sub-total		<u>14,127</u>	<u>11,960</u>
Loan repayments		12,996	24,996
Total payments		<u>27,123</u>	<u>36,956</u>
Net receipts/(payments)		(1,079)	(9,923)
Bank and cash brought forward		58,734	68,657
Bank and cash at 31 March		<u><u>57,655</u></u>	<u><u>58,734</u></u>

All the funds of the charity are unrestricted.

Norwich Zen Buddhist Priory

Registered Charity No. 1190154

Statement of Assets and Liabilities

as at 31 March 2024

	2024	2023
	£	£
Cash funds		
Bank	57,613	58,691
Petty cash	<u>42</u>	<u>42</u>
Total cash funds	<u>57,655</u>	<u>58,733</u>
Other monetary assets		
Gift Aid tax reclaim due	2,759	2,549
Total other monetary assets	<u>2,759</u>	<u>2,549</u>
Fixed assets		
Land and buildings	3 <u>316,028</u>	<u>316,028</u>
Short-term liabilities		
Creditors	<u>-</u>	<u>-</u>
Long-term liabilities		
Loans	4 <u>220,845</u>	<u>233,841</u>

Approved by the trustees on 05/08/2024 and signed on their behalf by

Christine Yeomans (Trustee)

Norwich Zen Buddhist Priory

Registered Charity No. 1190154

Notes to the accounts

for the year ended 31 March 2024

1. The charity is a charitable incorporated organisation registered with the Charity Commission (registration no. 1190154), on 29 June 2020. On 1st October 2020 the charity took over the assets and operations of the charity Norwich Buddhist Priory (registration no. 1155077).

2. All the charity's funds are unrestricted.

3. On 26/03/2021 the charity purchased a property for £316,028 (including ancilliary costs). The property is now the temple run by the charity.

4. Loans to the charity to finance the purchase of its property are from supporters of the charity and are interest-free and unsecured.

One loan of £210,845 is being repaid by monthly instalments over 24 years.

The remaining loan of £10,000 is repayable by 2031.

There are no guarantees given by the charity which could result in a potential liability.

5. One of the trustees, Rev. Leoma Hague, is the resident Prior at Norwich Zen Buddhist Priory, the temple run by the charity. As such her living expenses are met by the charity, in accordance with the provisions of the charity's constitution.