



Trustee Annual Report for  
Year Ending April 2023

**TRUSTEE ANNUAL REPORT  
& FINANCIAL STATEMENT  
YEAR ENDED 5<sup>TH</sup> APRIL 2023**

**THE LONGCHEN FOUNDATION TRUST**

**CHARITY REGISTRATION NUMBER: 802247**

## **Objectives and Activities**

### **Purposes of the Longchen Foundation**

The purposes of the Longchen Foundation as stated in its Trust Deed:

- a) To advance the study and practice of the religion of Buddhism according to all traditions of Buddhism and particularly the Maha-Ati tradition.
- b) To advance the religion of Buddhism through the work of the Ven. Dilgo Khyentse Rinpoche and the Ven. Chogyam Trungpa Rinpoche and their successors as representatives of the Maha-Ati tradition.

### **Public Benefit**

The Trustees confirm that they have had regard to the guidance issued by the Charity Commission on public benefit. The Longchen Foundation provides public benefit by supporting the work of Rigdzin Shikpo the successor of the Ven. Dilgo Khyentse Rinpoche and the Ven. Chogyam Trungpa Rinpoche as representative of the Maha-Ati (Dzogchen) tradition. Rigdzin Shikpo developed many the innovative courses which make Buddhism in general and the Maha-Ati (Dzogchen) tradition in particular more accessible to Westerners. These courses are now provided by the Longchen Foundation.

## **Achievements and Performance - Public Events**

The following national public events were held during the year:

### ***The Lion's Roar – Introductory Weekends***

- Gate 1 - June 2022 – Online
- Gate 1 - December 2022 - Online
- Gate 1 - January 2023 - Online

### ***Path of Freedom (PoF) Events***

- Path of Freedom Retreat - August 2022

### ***Heart of Buddha (HoB) Events***

- Heart of Buddha Teaching Day - December 2022

### ***Local Groups***

Local groups in London and Oxford offered many introductory Buddhist courses throughout the year.

### ***Longchen Open***

Longchen Open was launched to provide free meditation instruction via Zoom on Thursday evenings from 7pm to 8pm UK time.

<https://www.longchenfoundation.org/pof/longchen-open/>

## **Achievements and Performance - Further Training Events**

The following courses were held for current students during the year:

### ***The Lion's Roar***

- Gate 2 – March 2023 – Online
- Gate 4 – September 2022 – Online
- Gate 5 – January 2023 – Online

### ***Endless Compassionate Vision (ECV)***

- Level 4 – July 2022 – Online
- Level 5 – October 2022
- Level 6 – March 2023 – Online

### ***Longchen Heart Essence (LHE)***

- LHE - Stream 3 - October 2022 – Online

Note: Further details on the above courses are available on

<https://www.longchenfoundation.org/longchen-training/>

## Financial Review

### End of Year Financial Position

On the 5<sup>th</sup> of April 2023, the total cash held was £78,757 and total liabilities were £35,000, which consists of one interest free long term loan.

### Reserve Policy

The Trustees are aware of the need to maintain sufficient reserves as a contingency against an unexpected drop in receipts or an unexpected increase in required payments.

### Financial Report Receipt and Payment Category Details

- *Oxford Premises*: This served as the residence for Rigdzin Shikpo when he was in England and also as the Trust's administrative centre.
- *Donations Given*: A total of £18,000 was donated to Rigdzin Shikpo.
- *Advertising*: Using Google Ads and Longchen's website.
- *Educational Material*: This category consists of the following items:
  - Costs associated with preserving Longchen's audio and video archive
  - Books and equipment to assist Rigdzin Shikpo
  - Media Sales

## **Structure, Governance and Management**

### **Type of Governing Document**

Declaration of Trust Dated the 17<sup>th</sup> November 1988

### **How the Charity is Constituted**

Charitable Trust

### **Trustee Selection Method**

The appointment of a new Trustee is made by the following procedure:

1. New Trustees are appointed by a majority of the Trustees present and voting at a Trustees meeting.
2. The appointment needs to be recorded by a memorandum signed by the person presiding at such a meeting.
3. The appointment takes effect when the new Trustee then signs this memorandum.

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## Reference and Administrative details

Charity name	The Longchen Foundation
Other name the charity uses	Not Applicable
Registered charity number	802247
Charity's principal address	30 Beechey Avenue Old Marston Oxford OX3 0JU

## Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Arthur Rhodius	Chair		
2	Katharine Nairne			
3	Sally Sheldrake		Resigned 01/04/2023	
4	Daniel Raymond			
5	Vincent Power	Treasurer		

## Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
Not Applicable	Not Applicable	



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not Applicable
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not Applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not Applicable

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

Not Applicable

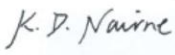



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## Declarations

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

Signed on behalf of the charity's trustees

<b>Signature(s)</b>		
<b>Full name(s)</b>	Katharine Davina Nairne	Vincent Power
<b>Position</b>	Trustee	Trustee & Treasurer
<b>Date</b>	11-10-2023	10-10-2023



Section A

Independent Examiner's Report

Report to the trustees/  
members of

The Longchen Foundation

On accounts for the year  
ended

5<sup>th</sup> April 2023

Charity no  
(if any)

802247

Set out on pages

11 and 12

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 05/04/2023.

Responsibilities and  
basis of report

As the charity trustees of the Trust, 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 Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Date:

11/10/2023

Name:

Rupert Taylor

Relevant professional  
qualification(s) or body  
(if any):

Address:

Easton Business Centre

Felix Road

Bristol BS5 0HE





Charity Name LONGCHEN FOUNDATION		No (if any) 802247		CC16a
Receipts and payments accounts				
For the period from	Period start date 6/4/2022	To	Period end date 5/4/2023	

## Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Donations Received	29,119	738		29,857	34,756
Teaching & Retreats	29,985			29,985	20,339
Educational Material	989			989	534
Oxford Premises	837			837	
Interest	51			51	
Miscellaneous	23			23	130
<b>Sub total</b>	<b>61,004</b>	<b>738</b>	<b>-</b>	<b>61,742</b>	<b>55,758</b>
<b>A2 Asset and investment sales, etc.</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>61,004</b>	<b>738</b>	<b>-</b>	<b>61,742</b>	<b>55,758</b>
<b>A3 Payments</b>					
Oxford Premises	22,056			22,056	22,499
Donations Given	18,000			18,000	18,000
Advertising	1,933			1,933	6,160
Teaching & Retreats	19,507			19,507	3,661
Educational Material	2,448			2,448	2,642
Miscellaneous	458	60		518	497
Management & Admin	4,701			4,701	444
<b>Sub total</b>	<b>69,103</b>	<b>60</b>	<b>-</b>	<b>69,163</b>	<b>53,903</b>
<b>A4 Asset and investment purchases, etc.</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>69,103</b>	<b>60</b>	<b>-</b>	<b>69,163</b>	<b>53,903</b>
<b>Net of receipts/(payments)</b>	<b>- 8,099</b>	<b>678</b>	<b>-</b>	<b>- 7,421</b>	<b>1,855</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>67,826</b>	<b>18,352</b>		<b>86,178</b>	<b>84,323</b>
<b>Cash funds this year end</b>	<b>59,727</b>	<b>19,030</b>	<b>-</b>	<b>78,757</b>	<b>86,178</b>

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Bank Accounts	59,725	19,030	-
	Cash	2	-	-
	<b>Total cash funds</b>	<b>59,727</b>	<b>19,030</b>	
	(agree balances with receipts and payments account(s))			
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Oxford premises	Unrestricted		-
				-
				-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Loans from Members	Unrestricted	35,000	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Daniel Raymond	10-10-2023	
		Vincent Power	10-10-2023	