

Charity Number: 1176063

# Triratna Liverpool

Report and financial statements  
For the year ended 31 March 2022

# Triratna Liverpool

## Reference and administrative information

for the year ended 31 March 2022

**Charity name** Triratna Liverpool  
also known as the Liverpool Buddhist Centre

**Charity number** 1176063

**Registered office and operational address** 2<sup>nd</sup> Floor, Melbourne Buildings,  
21 North John Street,  
Liverpool L2 5 QU

**Trustees** Trustees who served during the year and up to the date of this report were as follows:

David Thickbroom (Buddhashanti) until 25th June 2021  
David Tyfield (Ketumati)  
Janet Drury  
Ian Hannah (Ajitamati)  
Michael Whittam (Kshantabandhu)  
Gary Wych (Mokshaka) from 25<sup>th</sup> June 2021

Vicky Forman (Sumnadipa) holds title to a flat belonging to the charity. She was previously Chair of the Trustees and although out of office for a year, was re-elected to the Trustees at the AGM 2022.

**Bankers** Santander Bank  
Bridle Road, Bootle, Merseyside, L30 4GB

Triodos Bank  
Deanery Road, Bistol, BS1 5AS

Triratna Liverpool  
Trustees Annual report  
for the year ended 31 March 2022

The trustees present their report and the unaudited financial statements for the year ended 31<sup>st</sup> March 2022.

Reference and administrative information set out on page 1 forms part of this report.

## Objectives and activities

The object of Triratna Liverpool is to support the advancement of the Buddhism, in particular:

1. To encourage members and others to live in accordance with the teachings of the Buddha.
2. To support ordained members of the Triratna Buddhist Community and other duly ordained Buddhists, at the discretion of the Council of the charity.
3. To maintain close communication with and working under the guidance of the Triratna Buddhist Order and in co-operation with other groups with the same objects.
4. To promote the health and well-being of all through the application of the Dharma, the Buddha's teachings.

## Activities:

Triratna Liverpool carries out specific activities to further its objects such as:

- a. Hold services of worship and devotion;
- b. Organize lectures, courses, classes and retreats;
- c. Publish materials (written, online and for broadcast);
- d. Raise funds and invite and receive contributions;
- e. Provide or assist in the provision of money (grants or loans), materials or other help;
- f. Enter into contracts to provide services to or on behalf of other bodies;
- g. Establish or support any charitable trusts, associations or institutions;
- h. Establish branches or outreach groups.
- i. To carry on trade in the cause of carrying out its Objects
- j. To carry on temporary trade ancillary to carrying out the Objects
- k. Any other activity suitable to promoting the objects

The **powers of the charity** shall be carried out in accordance with the following **principles**:

- l. The charity is organisationally and financially independent from other groups with the same objects;
- m. The charity respects all aspects of the Buddhist tradition and recognises the value of each, and intends to work in harmony with all other existing Buddhist groups and organisations;

- n. The charity shall not, as such, be affiliated with any political party or organisations, and shall not take part in political activities except in accordance with guidelines issued from time to time by the Charity Commissioners of England and Wales;

The charity shall not be run for profit, and any surplus which may accrue from publications or other activities shall be devoted to the furtherance of its Objects.

The trustees review the aims, objectives and activities of the charity each year. This report looks at what the charity has achieved and the outcomes of its work in the reporting period. The trustees report the success of each key activity and the benefits the charity has brought to those groups of people that it is set up to help. The review also helps the trustees ensure the charity's aims, objectives and activities remained focused on its stated purposes.

The trustees have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives and in planning its future activities. In particular, the trustees consider how planned activities will contribute to the aims and objectives that have been set.

## **Achievements and performance**

The charity's main activities and who it tries to help are described in the Chairs Report. All its charitable activities focus on supporting the advancement of Buddhism and are undertaken to further Triratna Liverpool's charitable purposes for the public benefit.

### **Beneficiaries of our services**

The beneficiaries are the members of the Sangha (friends, mitras and order members) and the general public. The benefits for friends and members of the Sangha are; the building of a Sangha and a network of friendships, sharing and deepening meditation practices and discussing Buddhist ideas and applying them to daily living. There are a range of benefits resulting from this which improve wellbeing and increase positive mental states with the ultimate aim of individuals gaining enlightenment for the benefit of all beings. This has further impact upon the wider society in numerous positive ways from individual interactions to social and community action.

## **Chairs Report**

### 1. General Summary

The last two years have seen the world in the grip of a global pandemic and as such we as a centre, as a movement have had to adjust and adapt to continue to provide a foundation for people to come together in their practice.

I think you all agree this has been a testing time and unfortunately our Sangha has not been immune to its effects with people having to shield, self-isolate and it is with great sadness to us all suffer the loss of loved ones, family members and friends. To all those of you who have suffered we all send our metta to you and yours.

### 2. Events and Activities

#### *Sangha evenings*

We continue to have a thriving Sangha evening every Tuesday night which is attended on average by about 10/12 people.

The nature of this Sangha over the last 12 months has changed considerably. During the height of lockdown, we moved all our activities to an online platform, Zoom. This worked on the whole and was well attended. There were, as you can imagine, some technical issues but thanks to Sthirabandhu, Janet and Kshantabandhu these were usually resolved quickly, thank you.

On the 30th of March we had a very special event. We hosted a book launch by Vajradevi which was enjoyed and attended by 19 people.

On 27th March 2021 we returned to the centre, in limited numbers as per Government guidance, but maintained an online element making the Sangha evening a "hybrid" event. This was not without its difficulties, but it was nice for people to be able to see the centre even if it was just on screen.

We carried on engaging in our planned calendar of events the best we could. Some as a hybrid event, Buddha Day in May, and in person at the centre as and when the guidance allowed, Dharma Day in July.

On the 16th of November we came back to the centre. The hybrid element was dropped, and Sangha evenings were in person only. This was in time for Sangha Day in November which also saw a return to celebrating all together with a shared meal before the actives in the evening.

#### *Meditation and Buddhism Courses*

We ran an introductory day at the centre on 2nd October. This was led by Mokshaka, this has been the only in person course we have done in the last 12 months.

We have also been able to co-host a 6-week introductory event with Chandana, on-line from the Manchester Buddhist Centre, this was supported by Mariana and Caz from our Sangha.

#### *Dharma Study*

Sumnadipa continued to lead Dharma study for men and women on a weekly basis. The group is now in its third year. Thanks to Kshantabandhu for supporting Sumnadipa with her study group. This group is popular and provides a way for people to deepen their practice; to re-orientate their lives and to increase levels of skilfulness and understanding of the Dharma.

#### *Events*

Buddhashanti's on-line poetry workshops have also been well attended and very enjoyable. Thanks to Buddhashanti for leading these sessions.

#### *Family Gatherings*

Caz McCann has continued a weekly Family Gathering group which is for Sangha members with families or those who care for children. This has been offered on-line and in local parks during the pandemic and is very much appreciated by everyone involved. Thanks to Caz for her creativity and commitment together with support from Steve.

#### *Prison Service*

Kshantabandhu has continued to visit prisoners in a local prison, with a pause during periods lock down within the prison due the pandemic. Kshantabandhu has taken on a second prison where he provides Dharma activities for the prisoners including a large contingent of Vietnamese men. This has proved a challenge to which Kshantabandhu has responded by taking a language course in Vietnamese. This is now, after a great deal of perseverance by Kshantabandhu, beginning to pay off.

#### *Sangha Members*

We currently have about 38 Sangha members, some who come to the centre very regularly and others infrequently. Our average attendance seems to have increased towards the end of the year.

We currently have 5 Mitras who have asked for Ordination, Janet, Mary, Elke, Caz and Mariana.

### 3. Centre Team

As I have touched on earlier the last 12 months have been challenging but I am pleased to say that we have come together to support each other and keep the centre running, in whatever format, and provide meditations, talks, study and events.

The centre "team" has by the very exceptional circumstances we have found ourselves in had to be flexible in both numbers and approach to facilitate this.

All the people supporting all our activities have given their time and energy freely and lovingly, we continue to support each other, doing what we can, when we can, and we look forward to another happy and safe 12 months.

Thanks also to Janet who after many years as a trustee and having taken on the role of Treasurer has decided to resign from both roles. Thanks for all you have done for us we appreciate your love and support so much. I am glad to say this doesn't mean that we will see Janet less as she will continue to be a much loved and valued member of our Sangha.

We have also received written notice from Mokshaka giving his intent to resign as a trustee and as such he is not seeking re-election for another term. We would like to thank Mokshaka for his valued time as a trustee and look forward to seeing him at our forthcoming events next year and into the future.

So, to close, just to remind us all that the last 12 months have been difficult but it has seen us all come together, with activities and talks by Satyaketu, Ketumati, Kshantabandhu, Mokshaka, Sumnadipa, Arthavadin, Buddhashanti, Sthirabandhu, Janet, Caz and Mariana. Thanks to all the people who have attended the centre, or have come on line, thanks to you all.

Metta and love to us all.

## **Financial review**

The financial position of the Centre has remained fairly stable over the past 12 months. Although our costs have marginally outstripped our income we remain well within our reserves and there is no great cause for concern as we move into the coming year. We have lost a few of our regular donors but the majority have continued to generously support us. Over the course of the year our average monthly income has been £1,493 whilst our average monthly expenditure has been £1,597, leaving a shortfall of £104 per month.

### Income

Our two main sources of income are the donations from our members and friends and rent from the flat. This last year donations have accounted for 50.9% of income, the rent for 34.8% whilst the remainder has come from the total of courses and Gift Aid claim.

We are extremely grateful to those regular donors who have continued to support us throughout this year, particularly given the conditions that we are all having to deal with but we are aware that there has been a slight drop in the numbers. We are also aware that this year brings continued financial instability to many and it may well be that, for some, charitable contributions have been

suspended by necessity. On a positive note, since we are now meeting regularly in person again, contributions in the Dana bowl have increased again.

Our small shop has staggered along this year. Cards and books remain the mainstays but are not, at the moment, making any significant income to speak of.

We are grateful to Mokshaka again for running some courses on line and generating an income of £700

The Gift Aid Scheme gives us a small, but important, additional regular income. We need to ensure that we continue to take advantage of it and make everybody aware of their option to 'gift aid' their donations.

The rental income from our flat is as always invaluable. We are aware that should our tenant vacate the property then this income would cease quite abruptly, and with that in mind we are investigating the option of putting the property into the hands of an agent to ensure that the property is well maintained and re-let as soon as possible in order to minimise any loss of rental income.

### Outgoings

The biggest of our outgoings is of course the rent for the Centre and whilst we acknowledge that it may have its shortcomings we remain of the view that for a property in the city centre, the cost is not unreasonable.

Our electricity charges have remained stable thanks to taking out a fixed price contract last year. However, that contract expires at the end of July and although we can fix the price again for another 12 months the cost will be almost double what it has been.

A lot of time is given, and even some expenses are covered voluntarily by our members and friends and again we express our gratitude to the commitment and generosity of all involved. It is only this commitment which allows the Centre to continue as a source of friendship and inspiration to those who use it.

### Reserves

The total free reserves of the charity are £73,166. Our policy is to keep about £10,000 in our current account as a working reserve, and as of 31<sup>st</sup> March 2022 the balance was £13,392. The remainder is held in a savings account with the Triodos Bank.

## **Structure, governance and management**

The structure and governance of the charity is as follows:

### **Membership of the charity:**

#### **1. Admission of new members**

##### **a. Eligibility**

- i. Members of the charity must be natural persons.
- ii. Membership of the charity is open to those who are members of the Triratna Buddhist Order and those who are actively training for ordination into the Triratna Buddhist Order
- iii. and who are sympathetic to the aims and objectives of the Triratna Buddhist Order
- iv. and who are actively engaged in the work of the centre

## **b. Admission procedure**

The charity trustees:

- i. May require applicants for membership to be made in any reasonable way that they decide
- ii. May refuse an application for membership if they believe it is in the best interests of the charity for them to do so
- iii. Shall, if they decide to refuse an application, give the applicant their reason for doing so within 21 days of the decision being taken, and give the applicant the opportunity to appeal against the refusal, and
- iv. Shall give fair consideration to any such appeal and shall inform the applicant of their decision, but any decision to confirm refusal of the application for membership shall be final.

## **2. Transfer of membership**

Membership of the charity cannot be transferred to anyone else.

## **3. Duty of members**

It is the duty of each member of the charity to exercise his or her powers as a member of the charity in the way he or she decides in good faith would be most likely to further the purposes of the charity.

## **4. Termination of membership**

a. membership of the charity comes to an end if:

- i. the member dies
- ii. the member sends a notice of resignation to the charity trustees
- iii. the charity trustees decide that it is in the best interests of the charity that the member in question should be removed from membership and pass a resolution to that effect.

b. Before the charity trustees take any decision to remove someone from membership of the charity they must:

- i. inform the member of the reasons why it is proposed to remove him or her
- ii. give the member at least 21 days' notice in which to make representations to the charity trustees as to why he or she should not be removed from membership
- iii. at a duly constituted meeting of the charity trustees, consider whether or not the member should be removed
- iv. consider at that meeting any representations which the member makes as to why the member should not be removed, and
- v. allow the member to make those representations in person at that meeting if the member so chooses

## **Members decisions:**

### **1. General provisions**

Except for those decisions that must be taken in a particular way as indicated in sub-clause 3 of this clause; the charity shall strive to make all decisions of the members at a general meeting by consensus.

### **2. Taking ordinary decisions**

The charity shall strive to make all decisions by consensus. Should such a decision by consensus prove to be impossible to achieve within a reasonable time, the decision shall be by simple majority vote, with the chair of the Council of Trustees having the casting vote in the event of a tie.



### **3. Taking ordinary decision by written resolution without a general meeting**

Subject to sub-clause 4 of this clause, a resolution in writing agreed by all members who would have been entitled to take part in the decision making had it been proposed at a general meeting, shall be effective, provided that:

- a. a copy of the proposed resolution has been sent to all the members eligible to take part in this decision-making process; and
- b. the decision by members is unanimous, and is received at the principal office within 28 days from when it was circulated.
- c. Eligibility to be part of the decision-making process is limited to members who are members of the charity on the date when the proposal is first circulated.

### **4. Decisions that must be taken in a particular way**

- a. any decision to remove a trustee must be taken in accordance with clause 15.2.
- b. any decision to amend this constitution must be taken in accordance with clause 28 of this constitution.
- c. Any decision to wind up or dissolve this charity must be taken in accordance with clause 29 of this constitution.
- d. Any decision to amalgamate or transfer the undertaking of the charity to one or more charities must be in accordance with the provisions of the Charities Act 2011.

The charity is constituted under a constitution, originally adopted on 21.03.1994 and changed in 2017. The organisation registered as a charitable incorporated organisation on 21.11.2017 in England and Wales.

The trustees are members of the charity but this entitles them only to voting rights. The trustees have no beneficial interest in the charity.

All trustees give their time voluntarily and receive no benefits from the charity.

### **Remuneration policy for key management personnel**

We currently do not have any employees. All activities are undertaken on a voluntary basis.

### **Risk management**

The charity has a range of procedures relating to the management of risk such as Safeguarding policies for children and vulnerable adults.

**Triratna Liverpool**  
**Receipts and Payments Accounts**  
**for the year ended**  
**31<sup>st</sup> March 2022**

	2022 £	2021 £	(See Note)
<b>Receipts</b>			
Donations	9,125	11,117	
Courses	730	923	
Shop & Books	88	-	
Gift Aid	1,663	1,564	
Website	-	34	(1)
Rental income from owned property	6,240	6,240	
Interest on bank accounts	74	169	
	-----	-----	
<b>Total Receipts</b>	17,920	20,000	
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<b>Payments</b>			
Rent	11,500	11,500	
Electricity	482	419	
Charitable donations	270	240	(2)
Insurance	422	402	
Rates	942	942	
Shop & Books	38	-	
IT/Comms	623	955	(3)
Website	2539	-	
Publicity	349	123	
Chairs Retreat/Travel expenses	117	-	
Centre Development/Running costs	73	-	
Electrical Safety Certificate	384		
Expenses on owned property	1,427	1,180	(4)
	-----	-----	
<b>Total payments</b>	19,166	15,761	
	-----	-----	
<b>Net Receipts/(payments) for the year</b>	(1264)	4239	
	-----	-----	
Bank and cash balances at start of year	74,412	70,125	
<b>Bank and cash balances at end of year</b>			
Santander Account	13,392		
Triodos Account	59,774		
<b>TOTALS</b>	<b>73,166</b>	<b>74,412</b>	
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**Triratna Liverpool**  
**Statement of Assets and Liabilities**  
**as at**  
**31<sup>st</sup> March 2022**

	2022	2021
	£	£
<b>Bank and cash balances</b>	<b>73,168</b>	<b>74,412</b>
	-----	-----
<b>Fixed Assets</b>		
Land and Buildings	60,000	60,000
Shrine Room	3,862	3,862
Fixtures and fittings	9,912	9,912
	-----	-----
	<b>73,774</b>	<b>73,774</b>
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## Notes

- (1) This amount was a refund from a mixup with order and billing for new website domain name
  - (2) This is a regular donation made to the Development Fund of the Triratna European Chairs Assembly whose aims are to benefit the development of Triratna Centres around the world.
  - (3) Included in this section are regular subscriptions for mobile phone, mobile data  
Zoom Video Conferencing.
  - (4) Service Charge plus any repairs for flat.
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- a. All the charity's funds are unrestricted at the year end. Unrestricted funds are available to spend on activities that further any of the purposes of the charity.
  - b. The financial statements have been prepared in accordance with the Charities Act 2011. As a lower-income charity under section 133 of the 2011 Act, the trustees have elected to prepare the charity's financial statements using the Receipts and Payments basis.

## Statement of responsibilities of the trustees

Law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity's financial activities during the period and of its financial position at the end of the period. In preparing financial statements giving a true and fair view, the trustees should follow best practice and:

- Select suitable accounting policies and then apply them consistently
- Observe the methods and principles in the Charities SORP
- Make judgements and estimates that are reasonable and prudent
- State whether applicable UK Accounting Standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The trustees' annual report has been approved by the trustees and signed by

See separate sheet for declaration and signatures.

## DECLARATIONS

The trustees declare that they have approved the Report and Financial Statements for the year ended 31 March 2022.


Signed on behalf of the charity's trustees

Signed  .....

Full Name IAN HANNATT .....

Position JOINT CHAIR .....

Date 8/11/2022 .....

Signed  .....

Full Name Caroline McCann .....

Position Treasurer .....

Date 8/11/2022 .....