



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 01/01/2024 To 31/12/2024

Charity name: Morgannwg Endeavour Charitable Trust

Charity registration number: 1185722

Objectives and Activities

| | SORP reference | |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To preserve and to protect the health and wellbeing of renal patients and their families in Wales by providing and assisting in the provision of facilities, support services and equipment not normally provided by the statutory authorities |
| Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts. | Para 1.17 and 1.19 | Fundraising activities to increase awareness of the aims of the charity to include choir concerts, charity banquets, wine and cheese evenings, coffee mornings, golf events, guest speakers and regional celebrations. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | Para 1.18 | All trustees have due regard and strict observance to The Charity Commissions guidance on public benefit and comply with the duty in Sec 4 of the 2006 Act. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|--|
| Policy on grant making | Para 1.38 | N/A |
| Policy on social investment including program related investment | Para 1.38 | N/A |
| Contribution made by volunteers | Para 1.38 | All trustees and members contribute with their time and efforts on a voluntary basis |

| | | |
|-------|--|---|
| Other | | We are working in collaboration with the Clinical Lead Renal Medicine Network Southwest Wales and the Renal Service Manager Swansea Bay University Health Board for Haemodialysis services. |
|-------|--|---|

Achievements and Performance

| | SORP reference | |
|---|----------------|---|
| Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole. | Para 1.20 | We have gained more fundraising activities since the limiting Covid pandemic period. Activities are slowly returning to pre-pandemic time. We continue to raise awareness for the much-needed local haemodialysis unit. The Bridgend County dialysis unit is currently being established. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|--|-----------|--|
| Achievements against objectives set | Para 1.41 | |
| Performance of fundraising activities against objectives set | Para 1.41 | |
| Investment performance against objectives | Para 1.41 | |
| Other | | |

Financial Review

| | | |
|--|-----------|--|
| Review of the charity's financial position at the end of the period | Para 1.21 | All funds are currently held in a business current account pending the establishment of the local renal dialysis facility in the Bridgend County. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | The Trustees have decided holding reserves are not necessary or required at this time |
| Amount of reserves held | Para 1.22 | N/A |
| Reasons for holding zero reserves | Para 1.22 | We currently run a balanced budget with unrestricted funds. As a small charity, we have no salaried employees, no defined benefit pension schemes, no property or liabilities. Pending the completion and commencement of the new dialysis service, future expenditures will be addressed |
| Details of fund materially in deficit | Para 1.24 | N/A |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | Our fundraising efforts will continue going forward to ensure the charity is an ongoing concern. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| The charity's principal sources of funds (including any fundraising) | Para 1.47 | Primary sources of funding are donations and fundraising. |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 | N/A |
| A description of the principal risks facing the charity | Para 1.46 | N/A |
| Other | | |

Structure, Governance and Management

| | | |
|---|-----------|---|
| Description of charity's trusts: | | |
| Type of governing document (trust deed, royal charter) | Para 1.25 | Constitution |
| How is the charity constituted? (e.g. unincorporated association, CIO) | Para 1.25 | CIO Trust |
| Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees | Para 1.25 | All persons involved with the charity are voluntary. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|---|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | |
| Relationship with any related parties | Para 1.51 | Trustee relationship between Hon. Secretary/Co-Ordinator Mari Major MBE and Trustee Lewis Major (grandson) |
| Other | | |

Reference and Administrative details

| | |
|-----------------------------|--------------------------------------|
| Charity name | Morgannwg Endeavour Charitable Trust |
| Other name the charity uses | |
| Registered charity number | 1185722 |
| Charity's principal address | 49 Priory Ave Bridgend CF31 3L |
| | |

| | Trustee name | Office (if any) | Dates acted if not for whole year | Name of person (or body) entitled to appoint trustee (if any) |
|----|-------------------------|-------------------------------------|-----------------------------------|---|
| 1 | Christopher David Major | Hon. Chairperson/Trustee | | |
| 2 | Mari Major MBE | Hon. Secretary/Co Ordinator/Trustee | | |
| 3 | Howard Hughes | Trustee | | |
| 4 | Susan Leslie Bowen | Trustee | | |
| 5 | Pamela A Davies | Trustee | | |
| 6 | | | | |
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| 20 | | | | |

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

| | |
|---|-----|
| Description of the assets held in this capacity | N/A |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects | N/A |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets | N/A |

Additional information (optional)

Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
| | | |
| | | |
| | | |
| | | |

Name of chief executive or names of senior staff members (Optional information)

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| |
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Exemptions from disclosure

Reason for non-disclosure of key personnel details

| |
|-----|
| N/A |
|-----|

Other optional information

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| |
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Declarations

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

Signed on behalf of the charity's trustees

| | | |
|-------------------------------------|-----------------------------|--|
| Signature(s) | Mari Major - MBE | |
| Full name(s) | Mari Major MBE | |
| Position (eg Secretary, Chair, etc) | Hon. Secretary/Co-Ordinator | |

Date 30.10.2025

Objectives and Activities

| | |
|---|--|
| Statement of the objectives of the charity as set out in its governing documents | 1. To establish and to protect the health and well-being of mental patients and their families by providing and maintaining the provision of facilities, support services and equipment and normally provided by the statutory authorities |
| Statement of the main activities in relation to those objectives for the year period, in particular the activities, projects or services identified in the accounts | For a variety of activities to increase awareness of the aims of the charity to further their economic, charity business, with and through meetings, events, campaigns, and events, guest speakers, and regional organisations |
| Statement of compliance with the guidance issued by the Charity Commission on public benefit | As trustees have due regard and strict compliance with the Charity Commission's guidance on public benefit and comply with the duty by Sec 4 of the 2006 Act |

Additional Information (optimal)

You may choose to include further information where relevant

| | |
|--|---|
| Policy on work making | Not applicable |
| Policy on fundraising activities including programs related to fundraising | Not applicable |
| Contributions made by volunteers | As trustees and members contribute with their time and efforts on a voluntary basis |



CHARITY COMMISSION
FOR ENGLAND AND WALES

Morgannwg Endeavour Charitable Trust

(if any)

Receipts and payments accounts

CC16a

For the period
from

Period start date
01/01/2024

To

Period end date
31/12/2024

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 £ |
|---|---|--------------------------------------|-------------------------------------|---------------------------------|-------------------------------|
| A1 Receipts | | | | | |
| Donations | 3,052 | - | - | 3,052 | - |
| Fund Raising | 556 | - | - | 556 | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total (Gross income for AR) | 3,608 | - | - | 3,608 | - |
| A2 Asset and investment sales, (see table). | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total receipts | 3,608 | - | - | 3,608 | - |
| A3 Payments | | | | | |
| IT Consumables | 1,624 | - | - | 1,624 | - |
| Office Expenses | 589 | - | - | 589 | - |
| Staff Welfare | 418 | - | - | 418 | - |
| Conference Costs | 426 | - | - | 426 | - |
| Sundry Expenses | 1,508 | - | - | 1,508 | - |
| Bank Charges | 82 | - | - | 82 | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | 4,647 | - | - | 4,647 | - |
| A4 Asset and investment purchases, (see table) | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total payments | 4,647 | - | - | 4,647 | - |
| Net of receipts/(payments) | - 1,039 | - | - | - 1,039 | - |
| A5 Transfers between funds | - | - | - | - | - |
| A6 Cash funds last year end | 20,343 | - | - | 20,343 | - |
| Cash funds this year end | 19,304 | - | - | 19,304 | - |

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 £ |
|--|-------------------------|------------------------------------|----------------------------------|---------------------------------|
| B1 Cash funds | HSBC Bank | 19,304 | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | Total cash funds | 19,304 | - | - |
| (agree balances with receipts and payments account(s)) | | | | |

| | Details | Unrestricted funds to nearest £ | Restricted funds to nearest £ | Endowment funds to nearest £ |
|--------------------------|---------|------------------------------------|----------------------------------|---------------------------------|
| B2 Other monetary assets | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |

| | Details | Fund to which asset belongs | Cost (optional) | Current value (optional) |
|----------------------|---------|-----------------------------|-----------------|--------------------------|
| B3 Investment assets | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |

| | Details | Fund to which asset belongs | Cost (optional) | Current value (optional) |
|--|---------|-----------------------------|-----------------|--------------------------|
| B4 Assets retained for the charity's own use | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |

| | Details | Fund to which liability relates | Amount due (optional) | When due (optional) |
|----------------|---------|---------------------------------|-----------------------|---------------------|
| B5 Liabilities | | | - | |
| | | | - | |
| | | | - | |
| | | | - | |
| | | | - | |

Signed by one or two trustees on behalf of all the trustees

| Signature | Print Name | Date of approval |
|-------------------|------------|------------------|
| <i>Mari Major</i> | MARI MAJOR | 30.10.25 |