

MINDSET VITALITY

England & Wales · Charity number 1198750

Details

Status Registered

Legal form CIO

Registered 2022-04-27

Register [View on the Charity Commission register](#)

Contact

Address 4 St. Marys Road
Ynysmeudwy
Pontardawe
Neath Port Talbot
SA8 4QH

Phone 07392517015

Email MindsetVitality@gmail.com

Website <https://www.mindsetvitality.org.uk>

Activities

Objects: THE RELIEF OF NEED OF PEOPLE WHO ARE EXPERIENCING BEREAVEMENT IN SOUTH WALES FOR THE PUBLIC BENEFIT BY PROVIDING EMOTIONAL SUPPORT, COUNSELLING, AND PSYCHOEDUCATIONAL SERVICES.

Activities: Mindset Vitality aims to provide emotional wellbeing support to local families struggling to cope with bereavement, starting in Swansea, Neath & Port Talbot. We offer individual and group grief relief and facilitate friendship cafes and events

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives
- **Who:** Other Defined Groups

Geography

- Bridgend
- Carmarthenshire
- City Of Swansea
- Neath Port Talbot

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£5,963	£7,577	-	-
2024-03-31	£8,364	£5,852	-	-
2023-03-31	£10,226	£461	-	-

Trustees

Name	Role	Appointed
Fiona MacLeod		2022-04-01
Sian Jackson		2022-04-01

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Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 04	Year 2024		Day 31	Month 03	Year 2025

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

4 St Mary's Rd, Ynysmeudwy	
Pontardawe	
Neath Port Talbot	
Postcode	SA8 4QH

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	Fiona Macloed			
2	Sian Jackson			
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Appointed by founder/director/volunteer

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The relief of bereaved people in South Wales by providing emotional support, counselling and psychoeducation.

Promoting, setting up, and hosting a Bereavement Friendship Group in Pontardawe, Neath, and Swansea. Recruiting volunteers to co-host the group and help with developing our social media. Building networks with potential referrers.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

A new Bereavement Friendship group was started in Swansea, in St Mary's Minister in the town centre. It has now been running for over a year.

The Pontardawe group moved to a more comfortable and cheaper location in the Wellbeing Hub.

Section E

Financial review

Brief statement of the charity's policy on reserves

We keep enough money to finance our 3 groups for 12 weeks (6 monts).

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our source of funds is from grants that are used to run the groups without requiring any payment from attendees.

We received a bursary from Swansea University to pay an intern to gain experience with our charity.

Section F



Other optional information

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Fiona Macleod	Sian Jackson
Position (eg Secretary, Chair, etc)	Chair	Trustee
Date	31.01.2026	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name Mindset Vitality	No (if any)
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Receipts and payments accounts

CC16a

For the period from	Period start date 01.04.2024	To	Period end date 31.03.2025
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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					
Bursary from Swansea University	-	2,520	-	2,520	-
Grants & Donations	3,443	-	-	3,443	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	3,443	2,520	-	5,963	8,364
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	3,443	2,520	-	5,963	8,364
A3 Payments					
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	7,577	-	-	5,440	16,418
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	7,577	-	-	5,440	16,418
Net of receipts/(payments)	3,443	2,520	-	523	- 8,054
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	8,054	-
Cash funds this year end	3,443	2,520	-	8,574	- 8,054

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		-	-	-
		-	-	-
		-	-	-
	Total cash funds	8,574	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK

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

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

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

Categories	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
#VALUE!	Fiona Macloed	31.01.2026
#VALUE!	Sian Jackson	31.01.2026

MINDSET VITALITY

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Mindset Vitality

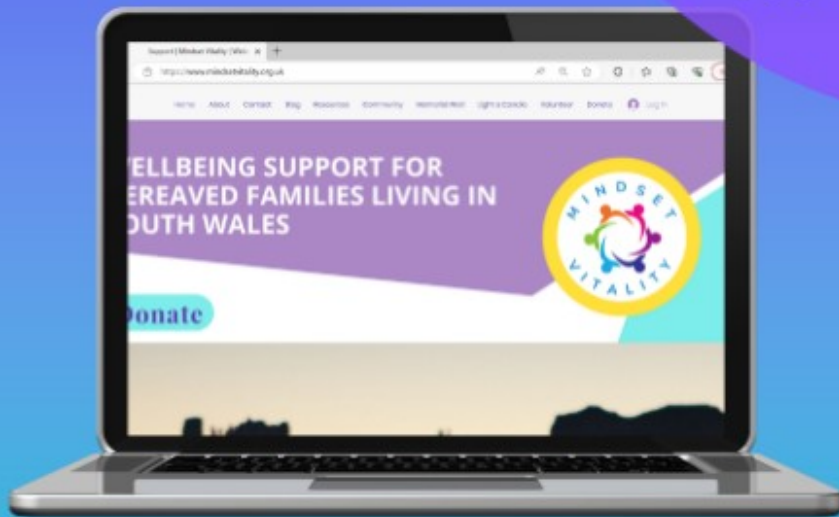


2024 Annual Charity Report

This report highlights our achievements, impact, and financial performance during the year 2023.-2024

Nurturing Hearts,
Restoring Hope.

www.mindsetvitality.org.uk



Mission Statement

Our mission is to alleviate the loneliness of grief and empower bereaved adults by providing access to Bereavement Friendship groups, psycho-education, and strategies for managing emotions and increasing self-care.

Financial Summary

The charity recorded a total revenue of £8364.00, with 74% allocated directly to program expenses, 15% to administration, and 11% to fundraising efforts.



24

We provided 24 face-to-face Bereavement Friendship group sessions for up to 20 individuals in Pontardawe. 9 became regular attendees.

20

In our Neath group we provided 20 sessions to 5 individuals.



311

Our website was launched in August 2023 and drew 311 visitors by the end of March.



Mindset Vitality

www.mindsetvitality.org.uk

Program and Impact

Overview of Program

Mindset Vitality ran Bereavement Friendship Groups in Pontardawe and Neath affording grieving adults a safe, compassionate space in which to share their grief.

Program Highlights

Our free Bereavement Friendship Groups have gradually increased drop-in rates and gained core groups of regular attendees who benefited from

- Sharing their struggles and secondary losses
- Normalising their feelings
- Learning easy to apply techniques to cope with strong emotions and improve their wellbeing.



Impact Assessment

Through our groups, we witnessed significant individual transformations, including improved socialisation, better coping skills, and increased confidence.



Mindset Vitality

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Financial Overview



Current Assets

Cash and Cash Equivalents	£121788.00
Accounts Receivable	
Inventory	
Total Current Assets	£121788.00

Revenues

Donations	£50.00
Grants	
Fundraising Events	£8314.00
Total Revenues	£8364.00

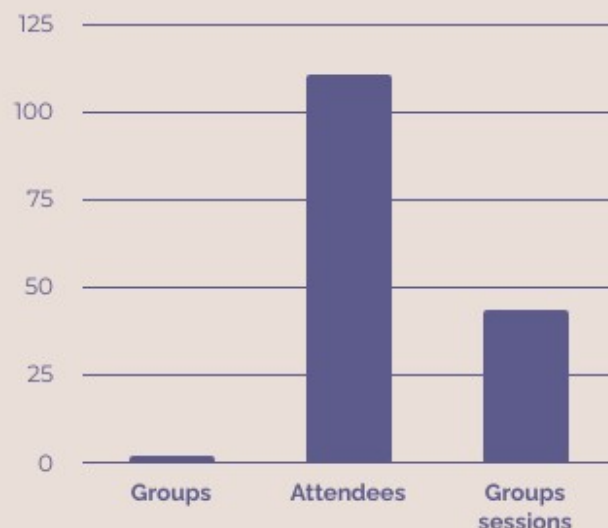
Expenses

Program Expenses	£6139.00
Administrative Costs	£1305.00
Fundraising Expenses	£920.00
Total Expenses	£8364.00



Funding Impact

The Impact Snapshot section provides a condensed overview of the significant impact created by Mindset Vitality's groups.



Words from Group Attendees

"Thanks to attending the Pontardawe group I have made friends and now socialise in another group too. I don't feel so isolated and have been able to implement self-care strategies to cope much better with my situation."

Pat

"I enjoy the group so much and have hardly missed a session. I have made new friends and now I am a volunteer co-host helping to run the group."

Val

"Mindset Vitality has helped me to build my confidence to socialise more. It has been invaluable to engage with other grievors and learn mindset techniques."

Shirley

"I have attended the group since it started and have not missed a session despite working. I was really struggling with my recent bereavement when I joined the group. Through Mindset Vitality I have new friends and helpful ways of dealing with my emotions."

Esther



Mindset Vitality

www.mindsetvitality.org.uk

MINDSET VITALITY

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Trustees' Annual Report for the period

From **01/04/2022** Period start date To **31/03/2023** Period end date

Charity name: **Mindset Vitality**

Charity registration number: **1198750**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The relief of bereaved people in South Wales by providing emotional support, counselling and psychoeducation.
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	Promoting, setting up, and hosting a Bereavement Friendship Group in Pontardawe. Recruiting volunteers to co-host the group and help with developing our social media. Building networks with potential referrers.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have taken into account the guidance issued on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	Gaynor and another volunteer have hosted the Pontardawe group. A further volunteer has helped with creating posts for social media.
Other		

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	<p>Gaynor ran the Pontardawe group seven times in this accounting period and helped five individuals who attended regularly.</p> <p>Most attendees saw our posters and came along to chat with others who were grieving.</p> <p>An example is a lady in her early 50s who was referred by a Social Prescriber because her father had just died. She has always lived at home and her mother died many years ago. She was very tearful upon arriving and had a private one-to-one session with our bereavement specialist, Gaynor Rosier. Since then, she has made significant progress in coping with her grief and has never missed a group meeting despite working.</p> <p>The benefits to society are that attendees are less lonely and will not need health and social services for grief symptoms.</p> <p>(The group is ongoing, twice each month.)</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	By gaining funding from The National Lottery Community Fund in August 2022 we were able to plan for and publicise our first group, which began in December 2022 in Pontardawe.
Performance of fundraising activities against objectives set	Para 1.41	We were unable to secure sufficient funding to employ staff to make faster progress as we were new and did not have a track record. Initially, money for insurance, a phone number, and office expenses were loaned by the founder, Gaynor Rosier.
Investment performance against objectives	Para 1.41	Gaynor has managed the charity's bank account to accrue interest and avoid bank charges.
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The year was managed economically, and expenditure was low as we were just starting to provide our first group.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Currently, there is no reserves policy. However, the accounts are managed frugally.
Amount of reserves held	Para 1.22	5000
Reasons for holding zero reserves	Para 1.22	NA
Details of fund materially in deficit	Para 1.24	NA
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	NA

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	The National Lottery Community Fund award in August 2022.
Investment policy and objectives including any social investment policy adopted	Para 1.46	None.
A description of the principal risks facing the charity	Para 1.46	The main risk is failing to secure further funding to continue our activities and expand them.
Other		

Structure, Governance and Management

Description of charity's trusts:		None.
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation whose only voting members are its charity trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	The founder looked for professional people in the care sector who had skills and experience as trustees and were sympathetic towards the aims of the charity.

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	We already had experience as trustees.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	So far, we have three trustees and the founder.
Relationship with any related parties	Para 1.51	None.
Other		

Reference and Administrative details

Charity name	Mindset Vitality
Other name the charity uses	
Registered charity number	1198750
Charity's principal address	4 St Mary's Rd Ynysmeudwy Pontardawe Neath Port Talbot SA8 4QH

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	Fiona MacLeod	Chair		
2	Leigh Batchelor	Treasurer		
3	Sian Jackson	Trustee		

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

Director name		
NA		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NA		

Funds held as custodian trustees on behalf of others

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

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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Exemptions from disclosure

Reason for non-disclosure of key personnel details

NA

Other optional information

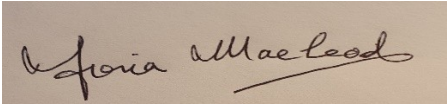
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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Fiona MacLeod	
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Position (eg
Secretary, Chair, etc)

Chair	
-------	--

Date

03.04.24

Date	Source	Money In	Money Out	Balance	Purpose	Receipt Ref	Cheque No.	Savings Acct	Interest
01.04.22	Balance bf	0	0	0					
13.12.21	Loan from founder	29.46	29.46	0	Printer cartridges	GB13M3OUMAEUI			
31.3.22	"	5.03	5.03	0	Domain name	Namecheap Order# 92622582)			
19.4.22	"	4.95	4.95	0	Mobile number	Lebera 19363177			
18.5.22	"	117.6	117.6	0	Insurance	Hiscox Policy Bee 14892068			
18.7.22	"	7	7	0	Bank charges				
		164							
24.1.23	Repaid	114.64						3	
	Outstanding	49.4							
26.7.22	National Lottery	9,998.00		9,998.00	Grant				
20.9.22			7	9,991.00	Bank charges				
3.10.22			9.8	9,981.20	Insurance	HISCOX	DD		
10.10.22			7	9,974.20	Bank charges				
1.11.22			9.8	9,964.40	Insurance	HISCOX	DD		
21.11.22			7	9,957.40	Bank charges				
1.12.22			9.8	9,947.60	Insurance	HISCOX	DD		
6.12.22			5	9,942.60	Mobile	Lebara	DD		
19.12.22			7	9,935.60	Bank charges				
22.12.22			10	9,925.60	Venue Hire	Pontardawe Heritage & '1		1	
23.12.22			3.4	9,922.20	Office supplies	Wilko			
3.1.23			9.8	9,912.40	Insurance	HISCOX	DD		
4.1.23			5	9,907.40	Mobile	Lebara	DD		
6.1.23			0.85	9,906.55	Refreshments	Kumar Stores			
16.1.23			9,700	206.55	Savings	Savings account		9,700	
17.1.23			7	199.55	Bank charges				
20.1.23			1.95	197.60	Refreshments	Kumar Stores			
24.1.23			114.64	82.96	Repay founder			3	

1.2.23			9.8	73.16	Insurance	HISCOX	DD		
3.2.23			5	68.16	Mobile	Lebara	DD		
3.2.23			0.85	67.31	Refreshments	Kumar Stores			
9.2.23									
16.2.23	Savings Acct	150		217.31				9,550	
17.2.23			3.45	213.86	Refreshments	Tesco			
20.2.23			7.85	206.01	Bank charges			9554	3.99
27.2.23			20	186.01	Venue Hire	Pontardawe Heritage & ' 2			
27.2.23			20	166.01	Venue Hire	" 4			
1.3.23			9.8	156.21	Insurance	HISCOX	DD		
6.3.23			5	151.21	Mobile	Lebara	DD		
9.3.23								9558.5	4.52
17.3.23			0.85	150.36	Refreshments	Kumar Stores			
31.3.23	Lloyds Bank	7		157.36	Repayment of charges				
31.3.23	Lloyds Bank	7		164.36	Repayment of charges				
31.3.23	Lloyds Bank	7		171.36	Repayment of charges				
31.3.23	Lloyds Bank	7		178.36	Repayment of charges				
31.3.23	Lloyds Bank	7		185.36	Repayment of charges				
31.3.23	Lloyds Bank	7		192.36	Repayment of charges				
31.3.23	Lloyds Bank	7		199.36	Repayment of charges				
31.3.23	Lloyds Bank	7		206.36	Repayment of charges				
	Total loans	164.04							
	Other income	10,062.51							
TOTALS			461						8.51

31.3.23	Owed to Balances founder	49.4		206.36				9,559	
	Venue Hire 50								
	Refreshment 7.95								
	Insurance 176.4								
Total	cost of Group 1		184.35						

Total cost of Office

57.81