



**Strength, Support and Nobility**

**THE M'DALA TRUST  
CHAIRMAN'S ANNUAL REPORT  
(For the period 28 May 2015 to 25 May 2016)**



30 Purcell Way  
Kreupelbosch, 7945  
Email – marleon@mweb.co.za

Registration IT.1134/2004  
Non-Profit Organisation Registration 035-987-NPO  
Public Benefit Organisation 930 017 409  
Website - www.mdalatrust.org.za

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## CHAIRMAN'S ANNUAL REPORT

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<b>Patrons</b>	<b>John Edmond</b> <b>Ms Aviva Pelham</b>	<b>Adrian Gardiner</b> <b>Paul Sulcas</b>	<b>David Hughes</b>	<b>Mark McNulty</b>
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*The broad objective of the Trust (as described in the Notarial Deed) shall be to provide food, medical and other practical assistance for the benefit of persons who, in the opinion of the Trustees, are poor, needy and destitute; including, (but without limitation thereof) refugees and persons displaced as a result of victimization and political and social circumstances.*

*With this as the basis the Trustees have agreed that whereas the essential primary focus would continue to be directed to pensioners from Rhodesia and Zimbabwe who reside in the Western Cape and who are identified as being in real financial need, consideration would, from August 2014, be given to Rhodesians and Zimbabweans residing permanently in the Western Cape who were not specifically members of a pension fund, but who have retired and are over the age of 65 and who are proven to be in real financial need. This extension of the operating mandate will be subject to the availability of funds and successfully satisfying the requirements of the detailed financial means questionnaire and is for persons who have lived or worked in Rhodesia or Zimbabwe for at least twenty five years after their education phase.*

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### **Introduction**

This is the eleventh Chairman's Report that I have penned and it is again my privilege and pleasure to state that this past year has seen further consolidation, achievement and success.

The M'dala Trust was formed in late 2003 and became fully operational in February 2004 specifically to provide support for the pensioners from Rhodesia and Zimbabwe who resided in the Western Cape and whose pensions had been terminated by the Zimbabwean government leaving them in extremely dire financial circumstances. For all of the past twelve years and three months the M'dala Trust has focused on and implemented its operating mandate, which since mid-2014 has been extended in scope.

I have not changed the format of the Chairman's Report but have, of course, updated content where appropriate.

### **Management**

Management of the M'dala Trust has continued to be structured, professional and efficient. Trustee meetings are held every two months except in

November and December and all Trustee meetings have been formally minuted with copies distributed to the Trustees and the Patrons. Full time management and administration of the Trust remains vested in the Chairman, but all principle decisions have been agreed and supported by the necessary quorum of Trustees.

### **Trustees**

The current Trustees are Alistair Ashforth, Peter Dobson, Michael Gibbons, Ant Grace, Ian Johnston, Nick Linnell and Leon Jacobs.

### **Financial**

A current financial report has been presented by the Chairman at all Trustee meetings and strict control has been maintained over the use of Trust funds. All unusual expenditure has been pre-approved by the Trustees and formal tax receipts have been issued to all South African based donors for tax relief purposes. In addition, all donors have received a formal letter of appreciation from the Chairman.

The Trust accounts have again been professionally scrutinized and audited, and this year's audit report again states that the accounts are completely accurate

and efficiently managed, and that there are no irregularities.

### ***Annual General Meeting***

The Annual General Meeting was held on 25 May 2016, at which this report was presented and accepted.

### ***Professional Support***

Mr Richard Rosenthal (of Richard Rosenthal Attorneys) has continued to provide all necessary legal advice and assistance, Mr Eric Salomon (of Eric Salomon and Company) the auditing service and Mr Konrad Laker the accounts examination and reporting service. These professionals provide their support and expertise *pro bono* and the Trustees remain sincerely indebted to them all for their ten years of generous and exceptional assistance.

### ***Patrons***

Our six Patrons have continued to support the efforts of the Trust where and whenever possible. Dave Hughes and Mark McNulty in particular have provided a high level of support which has been most sincerely appreciated.

### ***Pensioners and Pensioner Support***

Ann Bishop has continued to provide the necessary link with our pensioners who reside in the Fish Hoek area, but Ted Bebington has suffered a medical setback and is no longer able to assist. All monthly gift cards, except six, are now distributed satisfactorily by registered mail.

There were 25 pensioners on the support programme in January 2015, but sadly Trish Sleigh (83) passed away in October 2015 and Emily Heiden (88) passed away on 12 May 2016.

During the year three applications for financial support or acceptance onto the pensioner support programme were received. All of these were thoroughly examined against the carefully compiled detailed 'means test' and all were rejected as they simply did not qualify - all were substantially 'better off' than our average pensioner and some only had enjoyed brief service in Rhodesia or Zimbabwe.

The pensioner support programme continues to provide regular monthly Pick 'n Pay gift cards to the pensioners. In August 2015 the values of the gift cards were increased by R200 – the basic card increasing to R1,800 and the other two card values increasing to R1,950 and R2,100.

In December an extra amount of R500 was added to each gift card to make the festive season just a little better for the pensioners.

The monthly gift card outlay increased from R43,150 in May 2014 to R44,350 by year end. The annual cost of the gift cards has been R515,600.

The Trust remains determined that the regular monthly pensioner financial support programme is not reduced or terminated and that it remains possible to provide limited emergency medical support; any restrictions and an inability to assist essential needs would create severe hardships for the pensioners. To this end the Trust has continued to improve the essential financial reserve.

### ***Funding***

Funding of the Trust this year has been achieved from seven sources :

- #1 From our regular monthly debit order donors, many of who have been providing monthly donations since the Trust was established. Regrettably this pool of donors has again decreased markedly over the past year.
- #2 From three off-shore donors who have provided substantial funds every year.
- #3 From a number of mainly local donors who transfer funds at irregular intervals and for a variety of reasons, or who just make 'one-off' donations.
- #4 From the annual fundraising golf day.
- #5 A surprise amount from the Deceased Estate of a supporter of the M'dala Trust.
- #6 A donation by Mark McNulty (Patron) from his many professional golfing successes in the USA.
- #7 And finally, from the proceeds of the sale of memorabilia from Mr Ian Smith, donated by his daughter Jeanne Tholet.

The Trust again expresses huge appreciation to all the donors (who are too numerous to list in detail) as without their support the Trust would simply not be able to even begin addressing the primary task of pensioner support.

### ***Estate Planning Facility***

Ant Grace has been responsible for negotiating an estate planning facility with Sentinel Trust whereby supporters of the M'dala Trust are able to have their Wills compiled at no charge and eventually executed at a 50% reduction in executor's fees which would be credited to the M'dala Trust. The only requirement is that a notation is made in the Will by the individuals saying that they are supporters of the M'dala Trust and that the M'dala Trust is to receive the forfeited 50% of the executor's fees.

To date ten people have taken advantage of this facility.

## ***Annual Fundraising Golf Days***

### ***2015 Golf Day***

The tenth successive fundraising golf day was held at the Westlake Golf Club on 7 November 2015 and was another most enjoyable and successful event.

Support was received from a number of hotels and guest houses, most of the wine producers of Stellenbosch and the Boland (negotiated by Patron Dave Hughes), Western Cape golf clubs mustered efficiently by Dick Lockley, artist Larry Norton and many Cape Town based businesses and business people; all the donations were most generous and valuable, and contributed to the overall financial success of the event.

The Trust again extends thanks and appreciation to all the donors and supporters.

The golf day field was a full 144 players, the game was a 4 Ball Alliance (with the two best scores to count), prizes were awarded down to the tenth place and each player received a well-stocked 'goody bag' on registration. The auction of some attractive donated items was expertly handled by Dave Kinleyside and the valuable raffle draw was overseen by two Trustees; the twenty raffle prizes had a combined value of R65,000 and the lucky prize winners were clearly all delighted with their winnings. It was apparent that the golfers enjoyed the day and many will surely return for this year's event.

The event realised a profit of R171,987 which was quite remarkable given the generally depressed fiscal environment – but we were very satisfied.

However, in perspective it is worth noting that the golf day profit provided funds to pay for about three and a half month's worth of gift cards.

### ***2016 Golf Day***

The 2016 fundraising golf day – *our eleventh successive golf day* - will be held at Westlake Golf Club on Friday 4 November and will be a repeat of our previous successful fundraising golf days. The 4 Ball entry fee is once again R1,600 or R400 per player. The usual raffle for many valuable prizes and the auction of some attractive items will again be part of the event. The sale of raffle tickets for the intended R70,000 worth of prizes will commence on 1 August 2016 and the sale of all 900 tickets is hoped for. There is no doubt that another enjoyable well organized event will be held.

To date (25 May 2016) the player's field of thirty six 4 Ball teams is already completely booked, such is the popularity of this event!

## ***Donations of Clothing and Other Items***

A number of donations of quality clothing, curtains, linen and some assorted items have been received and these have all been distributed firstly to the pensioners who need such items and thereafter to Nazareth House, the Moth's Womens Association (MOTHWAS) in Plumstead and Nerina Gardens. The Trust is, as always, most grateful for all such donations and there is no doubt that those who receive any of these items are always most appreciative.

### ***M'dala Trust Website***

The M'dala Trust website is maintained on a regular basis providing useful information about Trust events, activities and achievements. The website address is [www.mdalatrust.org.za](http://www.mdalatrust.org.za).

### ***Business Continuity Planning***

The M'dala Trust business continuity plan has been kept up to date and copies are held by all Trustees. Its purpose is to ensure that the Trust's operating and management processes and business functionality will not be placed in jeopardy should the Chairman suddenly be unable to continue the full time general management and administration of the Trust. Essentially the objective is to provide detailed guidelines and requirements for the continued support of the pensioners.

Each Trustee has a copy of the plan and all are conversant with its contents.

### ***The Year Ahead***

No changes to the operating procedures or the overall objectives of the Trust are planned or likely and the professional management model that has applied since formation in November 2003 will continue.

**Leon Jacobs**  
**Chairman**