



The Rachel Swart Fund

HELPING PEOPLE WITH PHYSICAL DISABILITIES
ESTABLISHED 1960

April 2014 – March 2015 Annual Report



Overview

2014—2015 was a year of trying new initiatives that have contributed to the funds well-being and sustainability.

In the governance arena, these initiatives included:

- A score sheet was developed to help the manager and committee members to more accurately prioritize applications. These were developed in line with the Fund's constitution to ensure that beneficiaries are helped according to the level of their disability, their needs, the impact on their families and community and their income.
- Term limits have been approved for committee members.
- A sub-committee investigated how to treat the Fund's reserves. Currently these stand at just under R6 million invested and R 2 million of cash reserves. The cash reserves mainly come from donations and are used to fund the next twelve months' activities.

The sub-committee recommended that investments plus cash reserves should not exceed four years budgeted expenditure. This was accepted by the Committee and twice a year the exercise is done to determine if investments should be sold and released to fund costs of Rachel Swart Fund.

Part of this new journey has been a decision of the Committee to send the manager on business trips. The purpose of these trips was two fold:

- To find new professionals (mainly Occupational Therapists and Physiotherapists) to extend the reach of the Fund. These professionals see potential beneficiaries and recommend the type of mobility device required by completing an application form, and
- To educate professionals on correctly completing the application form sent to Rachel Swart. This form, apart from specifying the mobility aid, contains information required by the Fund to assess the suitability of the beneficiary such as the beneficiary's income and the impact it will have on the beneficiary and the community.

These trips to Free State, the Eastern Cape, KZN and Gauteng have proved successful. In addition the manager has also met with the Fund's donors on these travels.

Fundraising is an ongoing process at Rachel Swart. It is pleasing that the Fund's income is stabilising at the R1.8 million mark. More donors are now funding for set periods, usually two or three years.

This adds to fundraising challenges.

During the current year, Rachel Swart Fund helped 200 people with disabilities.

Thanks to our Donors

The Rachel Swart Fund is proud to be associated with donors who continue to faithfully support the Fund and its work. We are extremely grateful to the following donors for making this financial year such a success.

The Airport Company of South Africa

Carl and Emily Fuchs Foundation

Anglo American Chairman's Trust Fund

Momentum

Victor Daitz Foundation

Apexhi Charitable Trust Fund

Theodore Bewitz Trust Fund

Clifford Harris Trust

The Nussbaum Foundation

Aaron Beare Foundation

De Beers Trust Fund

Clifford Harris Trust Fund

Malcolm and Gladys Cameron Trust
Fund

Dischem Foundation

Capitec

In addition to these donors, R 60 280 of the fund's income is from our beneficiaries and family members who give regular small donations.

Impact

Old Mutual Two Oceans Marathon



The Rachel Swart Fund was one of the official charities for the Old Mutual Two Oceans Marathon. We had 20 runners who ran especially to raise funds for our charity and Jeremy Hazel did the Ultra Marathon in his manual wheel chair. 7 people were helped with motorized wheelchairs as a result of this effort

Carl and Emily Fuchs Foundation

Before Duane received his motorized wheelchair he was dependant on his friends to push him around. He found this very frustrating. Now Duane is a lot more self-reliant and can propel himself. It was mentioned on his evaluation form that, he now feels more in control of his own movements. His teacher writes that she can now send James around the school taking messages to other teachers if she needs to. His classmates no longer quarrel over who is going to push or not push him; this has taken some of the burden off the teachers who can get on with teaching.



Duane James

Dischem Foundation

Dischem Foundation in partnership with **Kfm** very generously granted the Fund R 50 000, 00. Aiden Elliot and Marissa Solomons were the recipients of this donation.

Marissa is a single parent and her quality of life has improved tremendously, she has her independence back and can do all her own shopping and look after her children with confidence and pride.



Anglo American Chairman's Fund



Elam has been attending the Cape Recife School in Port Elizabeth since 2008. She has cerebral palsy and is wheelchair bound. She has been using a manual chair at the school that has been too big for her and has been at risk of developing scoliosis. With the grant money **from Anglo American Chairman's Fund** we have been able to assist Elam. Elizabeth Barry, the occupational therapist at Cape Recife School has reported positively on the impact the chair is making to Elam especially with regards to her future development, and it is impacting the staff and other pupils as she is now more independent.

Nussbaum Foundation

Sibonelo says that since receiving his new chair he has been able to save a lot of money. The specialised lite weight manual chair that he has received has wheels that are easily dismantled and so when he catches a taxi he can put the wheelchair on his lap and does not have to pay for an extra seat. Transport has become so much easier and manageable. He is part of the local Rotary Club and helps to sell second hand clothing.



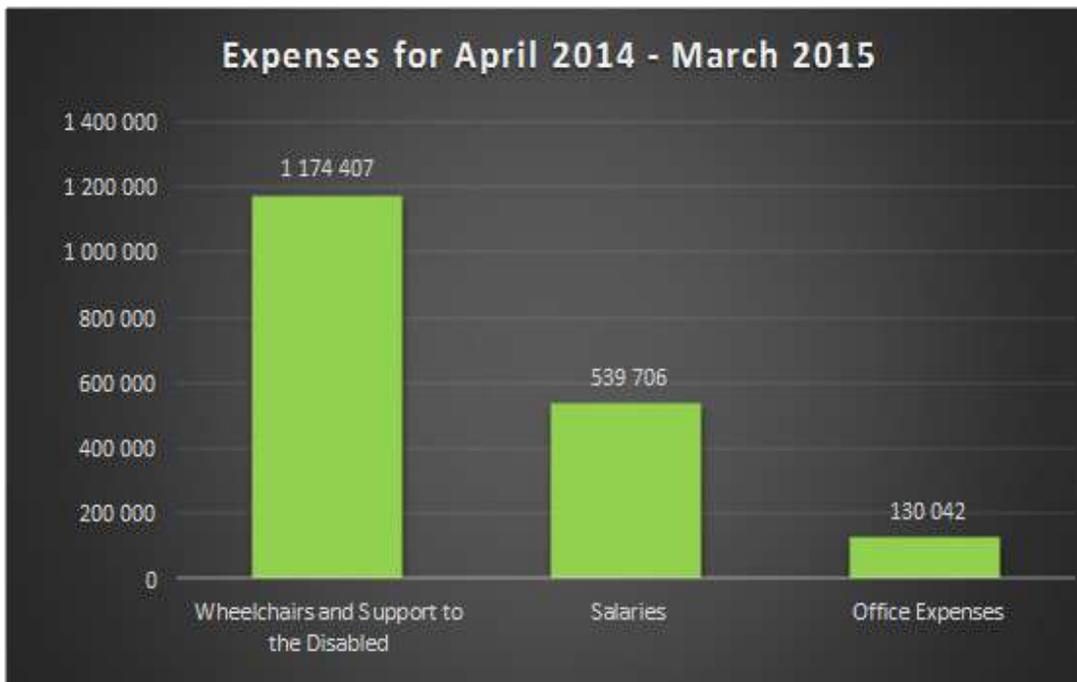
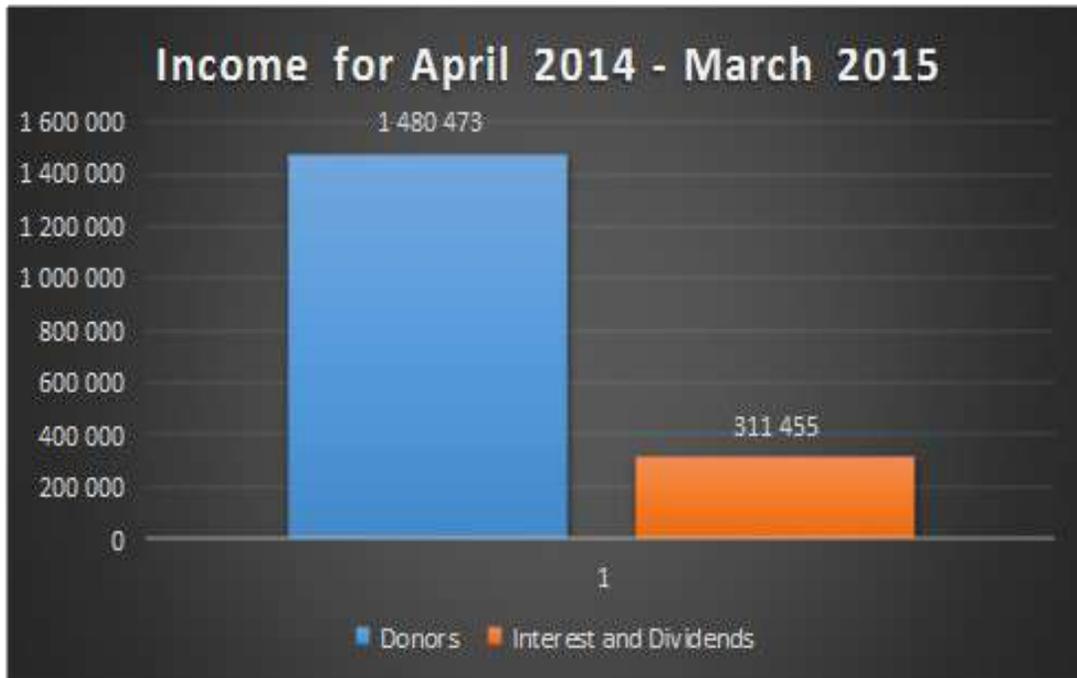
Sibonelo Mtshali

The DeBeers Trust Fund

Joy Badham-Thornhill (Manager) visited the Parys Hospital and the community worker in Sasolburg after the fund was able to re-engage with the **DeBeers Trust Fund**. This visit proved to be very beneficial as it enabled the manager to create an awareness of the Fund and make it possible for future on going applications to be made for people in that area living with disabilities.



Jack Shell



Financial Report

It is pleasing to report that the Fund's finances are in a healthy position.

Income, mainly from fundraising was just below the R1.8 level up from R1.6 million the year before.

Operating expenditure increase was limited to 2.5% and this together with the increased revenue enabled the Fund to increase Assistance to the Disabled by just under R230 000, an increase of 24%.

Staff and Committee Members

The Rachel Swart Fund is made up of three staff members and eight committee members.

The staff members are: Joy Badham-Thornhill, Nathaline Petersen and Mandy Newman

Committee Members: Mark MacGinty (Chairman), Jan Hofmeyr (Vice Chairman) Richard Heath, Igsaan Hendricks, Mirriam Mokosana, Necia Miller, Sameer Rahim, Joan Vosloo .

Monitoring and Evaluation

As was mentioned in our previous annual report increased effort to monitor the impact of our work through the evaluation forms is an ongoing process. Sameer Rahim, one of the Fund's committee members has linked the Fund with students from the University of Cape Town. These post-graduate students are doing a thesis on the impact that mobility aids have on people living with disabilities. They are using our client information to draw this information. This research will have a very positive impact on the Fund as it will enable us to give donor's more accurate monitoring and evaluation reports.

The Staff

Joy and her team, Mandy and Nathaline, are the bedrock of Rachel Swart and once again their efforts and work have greatly contributed to the ongoing success of the Fund.

Sadly, Nomie Tsotsobe a former staff member died earlier this year. She worked for Rachel Swart for thirty eight years and is still missed today.

The Committee

There were some changes to the Committee. Two members Necia Miller and Richard Heath resigned after many years of distinguished service.

Necia was with the Fund for over fifty years. With her long memories of Rachel Swart, she was an invaluable member of the Committee. Apart from her knowledge, her cheerfulness and loyalty will be missed.

Richard also has an association of over fifty years with Rachel Swart. His parents were friends with Sir John Ellerman – the founder of the Fund. In addition, Richard was one of the Fund’s earliest motorised wheel chair recipients. He gave invaluable legal advice to Rachel Swart and had many invaluable insights in identifying which mobility aid would best suit a beneficiary. Richard gave a memorable performance as the master of ceremonies at the Fund’s fiftieth anniversary celebrations.

It is pleasing to welcome back Verushka Ramanjam. As a paediatrician, Verushka is extremely knowledgeable in matching beneficiaries to mobility aids. Her friendliness and leadership qualities are also appreciated by the Committee.

CHAIRMAN

DATE