2024-2025 FISCAL YEAR END REPORT OF THE PRESIDENT, PERTH SENIORS FELLOWSHIP, MANAGERS OF MCMARTIN HOUSE

INTRODUCTION

The Board of Directors of the Perth Seniors Fellowship (PSF), under a contract signed with Ontario Heritage Trust, is license holder and operator of an *Ontario Heritage Trust Property known as McMartin House.* PSF has been officially recognized by the Ontario Government as eligible to receive grants to support the operation of McMartin House as a "Seniors Active Living Centre". We currently offer a range of ACTIVITIES FOR SENIORS.

The "Perth Seniors Active Living Centre", McMartin House, is located at 125 Gore Street East, Perth, Ontario, K7H 1J6.

Our Website is:

www.mcmartinhouse.ca **or** www.perthseniors.ca

We are Ontario Corporation # 297803 and Registered Charity# 119091510 RR 0001

On November 18th, 2011, the wording (but not the thrust) of our Mission Statement was revised to read as follows:

"Serving social, intellectual and recreational needs of our mature adult community while preserving the heritage of McMartin House"

WE ARE IN OUR 50TH YEAR OF OPERATON

We began as an informal organization, early in the 1970's. We were a group of local citizens playing Bridge in McMartin House. On November 22nd, 1974, as recorded in its Letters Patent, P&DSCF was formally recognized as a McMartin House Organization named "Perth and District Senior Craft Fellowship" operating with the principal objective of "promoting good fellowship among the Citizens of Perth and District, and in particular the senior citizens of Perth and District." Associated objectives included promotion of the "learning of crafts" and of social and learning "activities".

In 1975, McMartin House was recognized as a Historic Site and P&DSCF began offering more activities on the premises. In September of 1975, the Province of Ontario granted P&DSCF recognition "as a Corporation approved by the Ministry of Community and Social Services of the Province of Ontario, to operate the McMartin House as a Centre under the Elderly Persons Centre Act *with financial responsibility shared by the Province, the Town of Perth and the Fellowship, 50, 20, 30%."*

With respect to the process of reporting, we have been (and expect will continue to be asked) to report to The Ontario Heritage Trust (OHT). The OHT is our leaseholder and landlord and stipulates the individual requirements to be included in our reports. We also expect that we shall be asked to continue to report to the Town of Perth as a courtesy reflecting our gratitude for its annual grant supporting Perth Senior Fellowship.

As of December, 2024, the Province of Ontario has introduced a more complex process of relating to the provincial government. Smaller Communities, with Boards and Activity Directors consisting of Volunteers, may find the increase in required information and number of required reports overwhelming. In addition, the new emphasis on attempting to grow by using "Diversity, Equity and Inclusion" is a move with a political dimension that has cost Universities, Colleges and other public institutions (particularly in the United States) thousands of dollars. The reason is that EQUITY demands that individuals be "treated to ensure benefit or privilege" rather than be "treated to ensure merit" **whenever the latter is necessary to ensure adequate performance**".

Perth Seniors Fellowship Board of Directors as of the Date of this REPORT

Brian Henderson, President (retiring end of March)
Vivian Buchanan, Executive Director (retiring end of March)
Shirley McLenaghan
Susan Roach Ian Moffatt
Sue Brown
Erin Carter
Evelyn Morris
Wendy Quarrington

This Annual Report is provided and organized as stipulated under Section 3.2 of our lease with Ontario Heritage Trust:

Commencing in the second year of the Term and thereafter annually the Fellowship shall provide a written annual report to the Trust by no later than July 31 of every year for the preceding calendar year in respect of the following matters (the "Annual Report"):

A. a statement of income and expenses in respect of the Property for the year;

B. a summary of programming and events held at the Property; and

C. a property maintenance summary to include current year repairs, and outstanding Capital Repairs, Maintenance and Landscaping that may be required.

The Town of PERTH does not stipulate any requirements for reporting but relies upon the Board to take the Town's specific interests into account.

The Board will also do its best to provide information related to the Province of Ontario's information requirements as stipulated in their December Communication.

SECTION A: INCOME & EXPENSES

A statement of Income and Expenses pertaining to the property (for the year ending March 31, 2025) is presented below. The Board is appreciative of the vital financial support provided by the Province of Ontario, and the strong support, assistance and advice provided by senior officials at Ontario Heritage Trust, with whom we communicate regularly. We also very much appreciate the financial support provided by the Town of Perth in maintaining percentage contributions required for our provincial grants and for waiving property taxes. We look forward to continuing support with the new system.

PERTH SENIORS FELLOWSHIP

STATEMENT OF OPERATIONS AND CHANGES IN NET ASSETS

FOR THE YEAR ENDED MARCH 31, 2025

	2025	2024
REVENUE		
Grants, Donations and Subsidies	$ 43,149	$ 36,293
Rent	17,802	20,978
Membership Dues	5,940	5,160
Interest and Miscellaneous	637	636
	67,528	63,067
EXPENDITURES		
Advertising	250	326
Cleaning Expense	11,040	11,827
Equipment	1,355	-
Heat, Light and Water	9,047	10,660
Insurance	2,482	2,366
Office and Computer Supplies	1,785	1,443
Repairs and Maintenance	10,970	10,780
Salaries and Benefits	19,766	19,823
Telephone	930	880
Miscellaneous	251	-
Website and Internet	790	1,069
	58,666	59,174
EXCESS OF REVENUES OVER EXPENSES FOR THE YEAR	8,862	3,893
UNRESTRICTED NET ASSETS - Beginning of Year	44,342	40,449
UNRESTRICTED NET ASSETS - End of Year	$ 53,204	$ 44,342

The accompanying notes are an integral part of these financial statements.

Expenses such as Hydro, fuel and other such rapidly increasing costs continue to present an ongoing challenge that is not easily addressed. We are holding our own, however. Initiatives taken by Vivian Buchanan, our Executive Director, have once again contributed to the generation of the maximum potential revenue available from rentals. Vivian's initiative to encourage increased use of McMartin House for Yoga classes has been very helpful financially.

We increased our Membership Fees over three years ago and will do so again as of September 1, 2025. Our membership numbers have increased significantly as the membership of current activities such as Yoga, the Friday Bridge Club, Scottish Country Dancing and Line Dancing has grown.

We are continually adjusting our ***rental fees*** and have once again benefitted from ***voluntary donations*** from the Friday Bridge, Stamp Club, and Scottish Country Dancing.

At the time of this report, we do not have the Financial Statement from the accountant due to circumstances beyond our control.

SECTION B: REPORT on PROGRAMMING, EVENTS & INITIATIVES

Activities Report

Perth Seniors Fellowship endeavours to respond to community needs compatible with our Mission Statement by either *developing* or *offering* activities and events of interest to area seniors and that will support our efforts to keep seniors active and involved. We provide information on selected external activities and events on our Web site: www.mcmartinhouse.ca

Activities at McMartin House are described in detail on the site's "Our Activities" page. The page features a Monthly Calendar that presents a convenient summary of events available in the current month. Detailed descriptions of individual activities and their schedules follow the Monthly Calendar. A summary of the activities we offered at McMartin House to the end of the 2025 Fiscal Year is presented below.

McMartin House Activity Calendar One (General)

March 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2 Line Dancing 12:30-1:30 pm	3 Bridge Lessons 1-3pm Line Dancing 1:30-2:30pm Line Dancing Class 3:00-4:00pm	4 Rug Hooking 1-4pm Mahjong 1-4pm	5 Sewing Group 10-1pm Bridge 1-3:30pm Line Dancing Class 4:00-5:00pm	6	7 Scottish Dancing 9:30-11:30am Bridge 12:30-3:30pm	8
9 Line Dancing 12:30-1:30 pm	10 Bridge Lessons 1-3pm Line Dancing 1:30-2:30pm Line Dancing Class 3:00-4:00pm	11 Rug Hooking 1-4pm Mahjong 1-4pm	12 Sewing Group 10-1pm Bridge 1-3:30pm Line Dancing Class 4:00-5:00pm Stamp Club 7-9pm	13 Co-Housing 6-8pm	14 Scottish Dancing 9:30-11:30am Bridge 12:30-3:30pm	15
16 Line Dancing 12:30-1:30 pm	17 Bridge Lessons 1-3pm Line Dancing 1:30-2:30pm Line Dancing Class 3:00-4:00pm	18 Rug Hooking 1-4pm Mahjong 1-4pm	19 Sewing Group 10-1pm Bridge 1-3:30pm Line Dancing Class 4:00-5:00pm	20 **Board Meeting** **10:00 – 11:00am**	21 Scottish Dancing 9:30-11:30am Bridge 12:30-3:30pm	22
23 Line Dancing 12:30-1:30 pm	24 Bridge Lessons 1-3pm Line Dancing 1:30-2:30pm Line Dancing Class 3:00-4:00pm	25 Sewing Group 10-1pm Rug Hooking 1-4pm Mahjong 1-4pm	26 Book Club 10-12pm Bridge 1-3:30pm Line Dancing Class 4:00-5:00pm Stamp Club 7-9pm	27	28 Scottish Dancing 9:30-11:30am Bridge 12:30-3:30pm	

RENTALS

As we approach the end of our Fiscal Year, Rentals at McMartin House excluding YOGA have not increased since Covid dislocated quite a few "clinicians". Rentals on a short-term basis vary annually, but there are several organizations that are frequent short-term renters. This group includes the Art, Choir, Camera, Ski Valley and Rideau Trail clubs, and Otty Lake Association, Christmas Craft Fair, Dancing Lessons Group, Income Tax Preparers, First Aid Course providers and local chapters of the NDP and Green political parties.

SECTION C: MAINTENANCE SUMMARY

Detailed records of routine property maintenance have been submitted periodically to OHT as required, over the 2024--2025 financial year. The following summarizes overall maintenance activity during this period that was paid for by Perth Seniors Fellowship. We pay maintenance costs below $5000 and Ontario Heritage Trust pays eligible maintenance costs above $5000. McMartin House is a National Historic Site, and the Federal Government of Canada pays Capital costs.

Item/Person	Category	Cost
Furnace	Maintenance	$468.95
Elevator	Maintenance	$1087.50
Front Hall Lights	Replacement	$997.91
Fire Extinguishers	Maintenance	$510.76
Basement Room Painting	Painting	$6695.25
Dehumidifier	Supplies	$225.98
Urgel Berniquer	Various Repairs	$1180.20
TOTAL		**$11,166.55**

SECTION D: ACKNOWLEDGEMENTS

Covenants with Ontario Heritage Trust

Under Section 9 of our contract with Ontario Heritage Trust, the Fellowship covenants with the Trust to respect and protect the heritage nature of McMartin House and to honour or discharge several other specific commitments. With the submission of this report, we certify that we have honoured and discharged our covenants with Ontario Heritage Trust during the 2024-2025 period covered by this report.

Acknowledgement of our Board Members AND Activity Directors

Our Board members (listed earlier along with two staff members) are volunteers in the middle-aged to senior category of age. **They bring a range of varied employment backgrounds and experience to the table (as well as expertise and knowledge related to the needs of seniors**). Current membership includes individuals with experience in Management, Military Service, Farming, Accounting, High School and College/University Teaching, Project Management, Retailing, Health Services and Special Needs.

All the Activities we offer to Seniors in our area require Activity Directors familiar with the specific activity, whether stamp collecting, learning a craft or learning or playing a card or board game. Larger groups also require associate directors or supervisors. We simply could not survive as an organization, without our dedicated volunteers, whose personal efforts, along with those of our staff, are essential to the continuing viability of McMartin House as a "Seniors Active Living Centre". We gratefully acknowledge the contributions of the following individuals:

- Rainbow Line Dancing – Kari Cunningham
- Monday/Wednesday Line Dancing – Debbie Rider
- Rug Hooking – Andrea Hammel
- Mahjong – Mary Lebold

- Sewing – Jackie Rosa
- Book Club – Susan Code McDougall
- Stamp Club – Susan Murray
- Co-Housing – Judy Buehler
- Chair Yoga – Nancy Williams
- Scottish Country Dancing – Simone Crabb
- Wednesday Bridge – Simone Crabb
- Friday Bridge – Kveta Privora

Our Staff Members

Our Staff Members include two new employees (who are also appointed as Members of the PSF Board of Directors). These are Evelyn Morris, Supervisor, and Erin Carter Finance Manager. Both have moved into their important positions with ease and quickly became very valuable appointments.

On behalf of the Board, as President, I wish to express our gratitude to all of the above, and in particular to retiring Executive Director Vivian Buchanan for her extraordinary dedication to McMartin House, for competently and efficiently managing activities we offer, our financial affairs and our housekeeping and maintenance. Our document entitled "Recognition of Vivian Buchanan follows.

Brian J. Henderson, President,
Perth Seniors Fellowship,
June 20, 2025

McMartin