



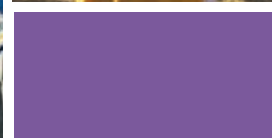
UNIVERSITY OF
KWAZULU-NATAL
INYUVESI
YAKWAZULU-NATALI

FOUNDATION

INFORMATION GUIDE



INSPIRING GREATNESS



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About Us

The UKZN Foundation is the fundraising arm of the University of KwaZulu-Natal. The University was formed on 1 January 2004 due to the merger between the University of Durban – Westville and the University of Natal. The new University brings together the rich histories of both the former Universities. The Foundation

history dates back to 1949 when the then Natal University Development Fund was established. In 1999, the University of Durban Westville Foundation was formed. After the merger, the name was changed in 2003 to the University of KwaZulu-Natal Foundation Trust to reflect the name of the merged institutions.



MISSION STATEMENT

To provide a professional fundraising service which supports the development of UKZN and addresses the needs and aspirations of our donors.



Our Approach

The Foundation establishes and cultivates relationships with prospective donors on behalf of the University and as such serves as the principal conduit for philanthropic donations aimed at supporting the strategic development needs of the University. In its drive to secure donations for the University's development, the Foundation forges relationships with individuals and alumni as well as establishes alliances and partnerships with corporates, trusts, foundations and other grant-making bodies across the world.

In selecting projects to support, the Foundation prioritises University initiatives that are responsive to societal, environmental, economic and technological needs of local, provincial, national and international communities, which the University serves. The philanthropic donations procured by the Foundation are used to support institutional and infrastructural development, student funding, and academic support as well as community outreach programmes.

These may take the form of academic chairs, endowments, bursaries, scholarships as well as restricted or unrestricted activities. Ultimately, these all contribute towards the advancement of the mission, vision, and goals of the University, while helping to fulfil the objectives of donors and benefactors.







Status

The UKZN Foundation is registered as a Charitable Trust and Public Benefit Organisation in terms of Sections 30(1) and 10(1) of the South African Income Tax Act of 1962, as amended. In addition, the Trust is registered as a Non-Profit Organisation in terms of the Non-Profit Organisation Act of 1997.

Governance

Legal and Fiduciary responsibilities for the Foundation and its activities rest with a Board of Trustees, which comprises members of the University Executive Management, members of the University Council and Convocation, and representatives from the broader community.

The Board of Trustees meets four times annually, or more frequently if necessary. The Audit and Risk Committee and the Remuneration Committee are sub-committees of the Board, which meet at least two times annually, or more frequently if necessary.

Organisational Structure

The organisational structure at the Foundation is relatively flat to prevent bottlenecks and unnecessary bureaucracy and comprises the Fundraising Team and the Professional Staff Team.

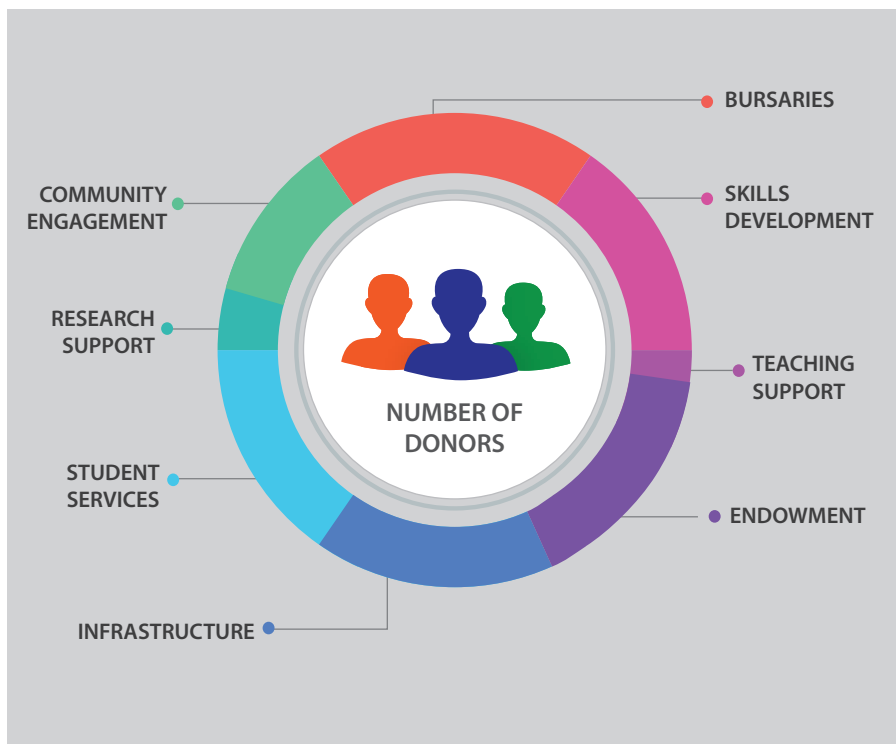


Utilisation of Donor Gifts

As a public university, UKZN relies on fee income and state subsidy to fund its operations. However, the development of infrastructure and the pursuit of its strategic vision requires philanthropic contributions, which expand the boundaries of knowledge and knowledge production.

UKZN Foundation accepts philanthropic gifts in cash/kind that do not result in any economic benefit for the donor, except for tax relief, in return for the funding.

In honouring the philanthropic intent of its donors, the UKZN Foundation ensures that donations are allocated to the cause for which they were intended as follows:

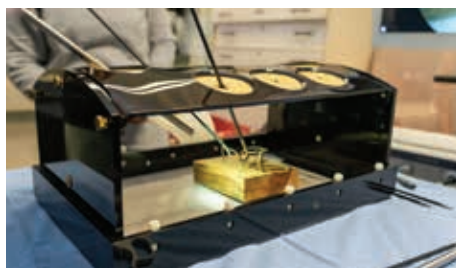




Specialised Equipment and Infrastructure

To generate and disseminate cutting-edge knowledge, the University relies on its donors who share the same vision to fund specialised equipment for research, teaching and learning. Donor funding is also required to build new lecture theatres and to refurbish existing ones to meet the needs for technology-led teaching and learning.





Community Engagement Projects

UKZN prides itself on its ability to generate knowledge and convert it into meaningful and measurable community-based projects. To this end, UKZN promotes projects in all its Colleges, which make a difference in the lives of communities ranging from farming, to land use management, environmental sustainability to civil society to arts and culture and others.

Endowments

UKZN believes in providing for future generations. As such the Foundation welcomes unspecified donations which are invested in the UKZN Endowment fund which is used as and when the need arises in the future.





Benefits of Giving to the UKZN FOUNDATION

Supporting the UKZN Foundation offers a range of tangible and intangible benefits, depending on where you reside. Your gift not only transforms the lives of students and graduates but also contributes to nation-building, community upliftment, and long-term societal progress. The Foundation ensures that every donation – whether local or international – makes a meaningful impact. The benefits of giving include the following, tailored to different donor groups:

South African Donors

The UKZN Foundation Trust is approved in terms of Section 18A of the Income Tax Act to issue certificates in respect of donations received. Tax certificates are issued to individuals or organisations to apply for a tax deduction from SARS. The Foundation will issue tax certificates for donations that are voluntary gifts where there is no quid pro quo, no reciprocal obligations and no personal benefit for the donor. In addition, businesses can use the donation towards BBBEE accreditation.



Estate Duty

All bequests made to the UKZN Foundation in a Will are exempt from the payment of estate duty in terms of section 4(h) of the Estate Duty Act, 45 of 1955. Further information on estate tax exemption can be provided on request.

United Kingdom Donors

The UKZN UK Trust is a registered charity in the UK (England and Wales) and donations to the trust from UK taxpayers are recognised by HM Revenue and Customs for Gift Aid Claims. Donors are advised to complete a Gift Aid declaration when making their donation as this will boost the amount going to the Trust.

American Donors

US-based donors can support our activities in a tax-efficient way, through contribution to the University of KwaZulu-Natal American Friends Fund at Myriad USA. Because Myriad USA is a public charity, within the meaning of sections 501(c)(3) and 509(a)(1) of the IRC, donors may claim the maximum tax benefits allowed by US tax law for their contributions.

HOW TO GIVE

There are a number of convenient ways of giving to UKZN through the Foundation.

◆ **INDIVIDUAL DONATIONS:**

Make a monthly or once off financial contribution by donating using your debit/credit card through the facility available on our secure website <https://ukzn.devman.co.za/devman/online/genomics/> or by requesting and filling out a printed donor form via foundation@ukzn.ac.za. You can specify which activities you would like your contribution to support.

◆ **NAMED BURSARY FUNDS:**

Establish a bursary fund in the name of your organisation, your own name, the name of your family or a loved one. Simply fill out the form on our website and one of our friendly Donor Relationship Managers will contact you to assist you through the process.

◆ **NAMED ENDOWMENT FUNDS:**

Establish an endowment fund in the name of your organisation, your own name, the name of your family or a loved one. There are minimum contributions required to establish a named endowment fund. Disbursements will only be made from the growth on the capital. Simply get in touch with us and we will contact you to assist you through the process.

◆ **BEQUESTS:**

Leave a legacy by including a gift to the University in your Will. Preparing a Will is a very personal and confidential exercise, and naturally, you would use your Will to benefit your family and loved ones first. However, you may also wish to consider including a bequest to the UKZN Foundation. Always seek the advice of your lawyer or financial consultant to assist you with your bequest. Contact our offices or fill out the bequest form on our website.

◆ **CSI PROJECT FUNDING:**

Partner with UKZN to run community-based outreach projects. Our fundraising team actively seeks partners to fund community-based projects. UKZN has a proven track record of converting CSI spend into tangible and measurable outputs. Organisations and individuals looking for strategic partners to engage in responsible community engagement are encouraged to contact the UKZN Foundation or a relevant Donor Relationship Manager for more information.



UKZN FOUNDATION TRUST LEGAL DETAILS

DATE TRUST REGISTERED : 27 MAY 2003 (From NUDF to UKZNF)
 AMENDED DATE : 31 May 2022 (2nd Amendments to Deed of Trust)
 TRUST DEED NUMBER : IT 589/2003/PMB
 NPO NUMBER : 030-967-NPO
 PBO NUMBER : 9300 128 12
 TAX NUMBER : 0324 483 163

BANKING DETAILS

Bank : STANDARD BANK
Account Name : The University of KwaZulu-Natal Foundation Trust
Account No. : 242 095 305
Type of Account : Business Current Account
Branch Code : 045426
Account held at : Pavillion
Swift Code : SBZAZAJJ (To be quoted for international funds to be received)





UNIVERSITY OF
KWAZULU-NATAL
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YAKWAZULU-NATALI

FOUNDATION

PRODUCED BY
THE UKZN FOUNDATION

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