



RHODES UNIVERSITY

*Where leaders learn*

## **CONTINUING THE LEGACY**

Building the Future





## VICE-CHANCELLOR'S MESSAGE

Rhodes University makes a significant contribution to the overall development of Southern Africa and the rest of the continent through a robust scholarship and academic support offering. Rhodes University's world-class education is aimed at building a holistic graduate which makes an indelible contribution to the further development of their spheres of influence and communities.

As a result, your bequest to Rhodes University is not just a contribution to the institution but to the thousands of deserving students and the communities they will undoubtedly serve upon leaving the hallowed halls of this magnificent campus. They would have learnt valuable life skills on top of their academic endeavours which will ensure that they too "pay it forward" and give a chance to thousands of other learners to learn, live, work and play where leaders learn.

We understand that your bequests ought to be backed up by our proven commitment to scholarly and academic excellence. We continue to hold up this end of the bargain by

consistently producing the best undergraduate pass rates in South Africa and outstanding postgraduate results.

Rhodes University's commitment to research, innovation and development is proven by the outputs of our academics in an effort to mould the institution into a true research university and global citizen. Our academic staff produce the best research output per capita of any South African university!

We take seriously the task of moulding our intellectually talented men and women so that they assume the mantra of real global citizens that provide innovative and inventive solutions to real challenges confronting the African continent and the globe.

As a result, Rhodes University has identified seven priority programmes which present opportunities for strategic collaborations for corporates, trusts, foundations, government and individuals with cutting edge scholarship to strengthen a progressive social compact and shared social purposes. We welcome your contributions and participation in breathing life to these priorities.



By agreeing to leave a legacy to the University you will be assisting us in achieving our mission in a most meaningful and lasting way. ————”





## RHODES PRIORITY PROJECTS

### Rhodes University Has Identified Legacy Priority Projects That Have Been Earmarked For Intensive, Targeted Fundraising Over The Next Five Years.

These projects fit into three broad areas: Infrastructure development, student experience, access and success, and sustainability.



#### The Centre for Postgraduate Studies

The Centre for Postgraduate Studies at Rhodes University is creating a community of scholars and thought-leaders who have a sense that they are contributing to something bigger than themselves and can spearhead South Africa's development.



#### The Institute for Nanotechnology Innovation (INI)

As the University continues to push for innovation and intensive research in nanotechnology, the need to provide space to house high-end research equipment to support world-class researchers is apparent. The project is led by the multiaward-winning Distinguished Professor Tebello Nyokong, an honorary fellow of the Royal Society of Chemistry. The main objective in this area is the construction of a customised, state-of-the-art Nanotechnology Centre.



#### Equity and Institutional Culture Unit

The main goal for transformation at Rhodes University is deceptively simple: to continue to graduate academically strong and adequately prepared students from all backgrounds on a per capita basis than any other public university in South Africa.



#### The Institute for Water Research

South Africa, and the Eastern Cape, in particular, is short of water laboratories. The integrated service and research facility will offer state-of-the-art water technology, including water chemistry analysis, microbiology, microbial genomics, ecological assessment, and eco-toxicology. The Institute for Water Research has the necessary core skills and relationships to drive a university-wide collaborative enterprise. The Water Lab will be used by many University teaching departments such as Zoology and Entomology, Microbiology, Environmental Science, Chemistry, Biochemistry, and Biotechnology.

The Water Lab's wide range of services will be available commercially and to researchers and students. Ultimately, the Water Lab will be self-sustaining.

The investment will refurbish and consolidate customised laboratory spaces, high-tech analytical equipment, associated computing capacity, and laboratory staff.



#### Isivivane Student Fund

The Isivivane Fund is a four-part campaign that addresses the challenge of the "missing middle" students who come from families who fall outside of the National Student Financial Aid threshold of R350,000 annual income but who cannot afford university fees.

The fund aims to increase bursary funding for undergraduate and postgraduate students and university endowment for the sustainability and maintenance of residences.



#### Pathways to the Future(VC Education Initiative) and Makhanda Circle of Unit

The University's investment in the Makhanda community is manifested in a strategic initiative that has been conceptualised and implemented through collaborative partnerships.

The Pathways project enhances the capacity of the historically disadvantaged schools in the city. Makhanda's oldest community organisation and reputed education NGO, GADRA, and the newly formed multi-stakeholder, Makhanda Circle of Unity, are civic bodies at the forefront of facilitating shared growth and development in the town.

The strategies cover two broad areas:

- Second chances for underprivileged senior grades learners in the townships: The project leverages the capacity of our formidable community engagement programme through mentorship.
- Strengthening wide civil society cooperation for open, transparent, and accountable governance of the city.





### Student Culture and Experience

Projects include building new facilities such as an astroturf, running track, and upgraded sporting facilities that contribute to students' wholesome experience. Sport is an essential part of a healthy lifestyle. Our University's location "at the centre" of the Eastern Cape holds numerous advantages for integrated regional sports and culture development.

Our strong community engagement programme is expected to lead to greater social cohesion, increase the fight against substance abuse, and build healthy communities for the Sarah Baartman District.



### Rhodes University Sports

The aim of this project is to try and create an alternative, active lifestyle on the campus. In this regard, there is a clear synergy between high levels of achievement and greater participation in team sports as a whole.

## OTHER PROJECTS

### Faculty or department support

The University's faculties and departments have various opportunities and needs that may interest you as University alumni. We know you have a strong affinity with your faculty or department. Why not contribute, financially or otherwise, to maintain the lifelong relationship and pay it forward by helping the next generation of our Old Rhodians?

### Annual Fund

The University's Annual Fund campaign provides a constant stream of income and much-needed financial support from the alumni community for various university projects. Continued support and generosity of our existing donors help to improve our students' lives by providing bursaries and scholarships and ensuring the sustainability of the University through endowments.

### Research

Rhodes University aims to position itself as a research-intensive university going into the future. In line with this objective, the University gives you various opportunities to help advance knowledge across all faculties and institutes. Some of these options are shared through the fundraising priority projects.

### Give 5

Gives is a student-driven fundraising campaign that was established in 2004 by a group of students to assist other fellow students.

Over the years and through the sheer dedication of our students, staff and alumni, the fund has grown significantly. Each year, the funds that are raised or donated are handed to the Division of Student Affairs to assist students with pocket money, toiletries and transport during the vacations.

Constant support to the fund ensures that we continue to demonstrate the spirit of Ubuntu while protecting the dignity of all our students.



## A LIVING LEGACY - THE POWER OF A BEQUEST

A bequest allows you to honour a loved one, while providing critical support to the University through bursaries or various other funds underwriting research and teaching. Giving by bequest costs nothing now, yet it may give you a great deal of satisfaction to know that your future gift will live on. However, few are in this league! Over the past 50 years a number of modest sums bequeathed to Rhodes University have been carefully invested and, in many cases, grown to millions of Rands, which now provide annual bursaries and scholarships for promising students. Bequests of shares, insurance policies and buildings have also been put to good use.

By leaving a bequest  
you will be:  
Continuing the Legacy -  
Building the Future





## WHAT IS A BEQUEST?

A bequest (or legacy) is simply a gift of money and/or property left to a named beneficiary, such as Rhodes University. The bequest may take various forms, for example:

A percentage of your estate - a good option, since it is difficult to predict the net value of your estate at the time of your death. By giving a portion of the total, you ensure that all your beneficiaries receive their fair share.

Specific Bequest - a gift of a fixed sum of money, property, stocks and shares, valuables or works of art.

Deferred Bequest - process whereby a beneficiary (your spouse or children) is given the right to use an asset (such as a house) during their lifetime, after which ownership passes to another.

The proceeds of a life policy - often taken out in the early years to safeguard a young family and which may no longer be necessary once the children have grown up. Policies may be made payable to Rhodes by means of a beneficiary nomination in favour of the University.

A bequest may be made subject to whatever conditions you like. Thus, the bequest may be used for example, to fund a Scholarship or a Bursary in memory of yourself or a loved one. On the other hand, you may prefer to leave the bequest to the Rhodes University Endowment Fund to be used at its discretion. The options are endless and we would welcome the opportunity to discuss these with you.

If you do decide to make a bequest to the University, please advise us of your intentions - so we may recognise you and thank you for your valuable support.



### Dr Joe Soap\*\*

Besides being a loyal donor to Rhodes University throughout his lifetime, Dr Soap left just under R8 million to Rhodes University in 2017. The money has been invested in the Rhodes Foundation and between 4-5% of the current market value is used to provide partial bursaries to children and grandchildren of Old Rhodians. A total of 21 students have benefitted since inception.

## R8m Left to Rhodes in 2017

### Mrs Moira Smith\*\*

In 2012 Mrs Smith left the proceeds of the sale of her house in London to Rhodes for the Pearson Young Memorial Scholarship in Molecular Biology.

### Mrs Esther Clark\*\*

In 2004 Mrs Clark left R3.4 million to Rhodes University for establishment of LLB bursaries in the Faculty of Law. The market value of the fund as of 31 December 2021 was R17.6 million and R800k of this amount is distributed annually to provide partial bursaries

\*\*Name changed

## ATTORNEY ADVISORY INFO

Forward planning and a valid Will ensure that your estate is divided and distributed in accordance with your wishes.

If you do not have a Will you should waste no time in having one drawn up. Your attorney is the best person to advise and plan your Will in such a way as to minimise death duties and keep it flexible to allow for future events. The simplest of wishes must be put into the proper legal language and correctly signed and witnessed.

If you die intestate (without a valid Will) then the laws of intestacy apply which might not be in accordance with your wishes or needs of your family. A valid Will gives you the comfort of knowing that your wishes will be carried out. Verbally expressed wishes or promises have no legal effect. Changes in your personal situation (e.g. divorce, remarriage, the death of an heir) or in your estate (e.g. you have bequeathed items you no longer own) could also render your Will out of date. It is important to revise your Will from time to time.

Including a bequest in your Will is a way of making a substantial gift, without having to spend money now.

Estates are currently free of tax duty up to a specified amount, where after estate duty per-centage is charged. Any amount

bequeathed to a recognized charity or an educational institution such as Rhodes University, is free of estate duty and so deducted from the net estate value.

## RHODES UNIVERSITY BEQUEST ASSOCIATION (RUBA)

When you make a confirmed bequest to Rhodes University you have the option of becoming a member of the Rhodes University Bequest Association (RUBA). There is no stipulation regarding the amount of the bequest and, as we are mindful of the fact that bequests are personal in nature, there is no need to make the amount known.

As a welcoming gift you will receive a set of crystal wine glasses engraved with the Rhodes crest and the words Rhodes University Bequest Association. As a RUBA member you receive invitations to special functions that are planned from time to time, providing you with the opportunity to interact with your peers.











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