



UMEÅ UNIVERSITY

PROCEDURES FOR DONATION ACCEPTANCE

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¹ This document has been translated from Swedish into English. If the English version differs from the original, the Swedish version takes precedence.



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1. Description

This document outlines the division of responsibility and process in place for the University's work with donations of financial assets.

2. Background

Supporting and donating to Umeå University should be simple. At the same time, it is important that the University has clear procedures and division of responsibilities regarding donation acceptance. These procedures aim to create the conditions for an increasing number of donations by clarifying the work process regarding the roles, responsibilities and allocation of donated funds, and responses to donors.

These procedures are linked to *Policy for donation acceptance at Umeå University* that was approved by the Vice-Chancellor on 9 June 2009. The Swedish Donations Ordinance (1998:140) contains overarching provisions on the acceptance of donations.

3. Procedures

3.1 Types of donations

These procedures apply for donations from one-off payments, bequests or to affiliated foundations. They do not apply for other types of donations, for example, cultural artefacts intended for inclusion in the University Library's collections.

One-off payment

Financial donations paid as a cash transfer via BankGiro.

Bequest

Donations left to the University in a person's will. The Financial Office accepts bequests and helps with the sale of properties, bonds, or equivalent. The Financial Office arranges contact with the estate of the deceased person (equivalent). The will and testament must include the University's name and company registration number. Only assets that may be sold can be bequeathed to the University. Properties bequeathed to the University must be sold as soon as practically possible.



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Affiliated Foundations

The University may administer affiliated foundations if the foundation has a minimum capital of SEK 5 million (in normal cases) and it does not conflict with the University's mission. The University Board will decide to affiliate a foundation with Umeå University. The University Management and the relevant faculty board must be consulted before such a decision can be taken. The Financial Office is responsible for the foundation's financial administration. The Planning Office is responsible for the preparatory work for the Vice-Chancellor's decision on the composition of the foundation's committee.

3.2 Information

Information about donating to Umeå University must be available on the website. It should include the following:

- Suggestions for potential areas where the donations can be used, including the specially selected causes as well as the possibility to make a general donation with no specific cause.
- Payment details for making a donation.
- Information about donating to Umeå University through a bequest.
- Information about the possibility of the University administering affiliated foundations on certain conditions.
- Information about how much has been donated to the University in recent years and how these funds have been used.
- Information about when it is possible to donate anonymously.
- Information about the limitations to accepting conditional donations as per the Donations Ordinance and the Policy for donations acceptance at Umeå University.
- Information and links to the University's affiliated foundations that are open for donations.
- Contact details for the Deputy University Director for discussions prior to donation and university legal officers for establishing an affiliated foundation.



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3.3 The Donation Committee

Each year, the Donation Committee determines how to allocate funding from donations that did not specify a special cause. A representative from the University Management chairs the Committee, whose members are representatives from each faculty. The Planning Office provides administrative resources for the Committee's work. The Vice-Chancellor decides on the committee's members following nominations from each faculty.

Gender equality must always be taken into consideration when the Donation Committee decides how funding will be allocated.

3.4 Donation causes

Donors who make one-off payments or bequeath something to the University are able to choose for their donation to be used for one of the causes below.

Affiliated foundations stipulate donation causes in their statutes. Before a foundation can be affiliated with the University, there must be an assessment of whether the proposed causes can be accepted.

To the greatest extent possible, cause descriptions should be all-embracing and formulated in such a way that the foundation's purpose is sustainable over time, and in line with Umeå University's mission.

Specially chosen causes

A limited number of specially chosen causes are to be presented to the donors. The Vice-Chancellor determines separately which special causes are to be offered.

Other specific cause

It is possible to donate to another specific cause than those specified. Such causes must be part of the University's existing or planned operations and activities, and be in line with the provisions in the Donations Ordinance and the University's policy. Donations which do not meet these conditions will be repaid to the donor.

General donations

A person is able to donate to the University without stating a specific cause. The Donation Committee will determine how these donations are used.



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3.5 Making the donation payment

One-off payments are to be made via BankGiro to the account held by the Financial Office. Donors must state the cause and their contact details in the message field included with the BankGiro payment. Payments from bequests are to be processed as per the instructions from the Financial Office.

3.6 Allocation of donated funds

3.6.1 One-off payments

If specially chosen cause is stated

The Financial Office will ensure that the donation is passed to the relevant project.

If another specific cause is stated

The Financial Office will inform the relevant faculty who will then investigate which project will receive the donation and inform the Financial Office. Each month, the Financial Office must inform the Planning Office about the donations received.

If no specific cause is stated

The donation is paid into the university-wide project (7001). Each year, the Donation Committee decides how the received funds will be distributed. The Planning Office ensures that the funds are paid out to those responsible.

3.6.2 Bequests

If specially chosen cause is stated

The Financial Office will ensure that the donation is passed to the relevant project.

If another specific cause is stated

The Financial Office will inform the relevant faculty who will then investigate which project will receive the donation and inform the Financial Office. Each month, the Financial Office must inform the Planning Office about the donations received.



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If no specific cause is stated

The donation is paid into the university-wide project (7001). Each year, the Donation Committee decides how the received funds will be distributed. The Planning Office ensures that the funds are paid out to those responsible.

3.7 Responses to donors of one-off payments

Responses are usually sent out as stated in the information below. However, for donations over SEK 1,000,000, the response is sent as per the donor's wishes.

Donations up to SEK 50,000

Each month, the Planning Office will either email or post out a letter of thanks to new donors based on a generic template.

Donations between SEK 50,000 and SEK 1,000,000

Letter of thanks based on a generic template sent out monthly by the Planning Office. Emailed or posted. In addition, a telephone call from the Deputy University Director.

Donations over SEK 1,000,000

Personalised letter of thanks sent out monthly by the Planning Office. Emailed or posted. Additional gesture, for example lunch with representatives from the University Management, invitation to the Spring Graduation, etc.

3.8 Affiliated foundations

As of 2018, Umeå University has two affiliated foundations open for donations.² Information about donations must refer to these foundations and provide information about what specific causes donors can donate to through the affiliated foundations. Otherwise, the foundations are exempt from the procedures in this document.

² Medicinska insamlingsstiftelsen and Insamlingsstiftelsen för strokeforskning i Norrland.