

NAMING POLICY

SCOPE	All departments and employees
CONTACT	Director of Advancement, Advancement Office
APPROVED BY	Board of Governors
DATE APPROVED	March 6, 2014

1 PURPOSE

The purpose of this policy is to set out the framework for granting named recognition assigned to university assets and university initiatives or activities.

2 SCOPE

This policy applies to the naming of any university asset, initiative or activity as a form of recognition for the contribution of an individual or organization to the university, including but not limited to the following entities:

- programmes, departments, schools or institutes;
- buildings or discrete components of buildings (wings, lecture halls, classrooms, laboratories, etc.) or other locations on campus;
- endowed programs of research, teaching or service;
- chairs, professorships, lectureships, lecture series;
- library services, collections of books, or information resources in a range of formats;
- endowed and annual scholarships, awards and bursaries for undergraduates and graduates;
- other initiatives the university may see fit to name in order to perpetuate the name of the benefactor.

3 POLICY

- a) Naming of a university asset or university initiative shall be made in accordance with this policy and related procedures.
- b) The Director of Advancement must be consulted prior to making any offer of named recognition.
- c) Naming may be granted to recognize:
 - i) a current expendable gift;
 - ii) an endowment;
 - iii) a gift-in-kind; or
 - iv) in extraordinary circumstances, the distinguished contribution of an individual or organization to the university or broader community.
- d) University assets or university initiatives may be assigned the name of the donor making the gift, or the name of another individual or organization where the consent of that individual or organization (or their estate or successor) has been obtained.

- e) Naming shall enhance the profile and image of the university; it shall not, in the opinion of the university, undermine or be likely to undermine the university's reputation.
- f) Naming shall not be granted in a manner that implies the university's endorsement of a political or ideological position or the use of a particular product or service. This does not preclude a naming with the name of an individual who has at one time held public office or with the name of an individual or company that manufactures or distributes commercial products.
- g) Naming shall be independent of, and shall not influence, any decisions made by the university in relation to internal academic, administrative or operational matters.
- h) Named recognition may be revoked in accordance with the applicable procedures in Section 5 where the association of the name with the university undermines, or in the opinion of the university, is considered likely to undermine the university's reputation.
- i) All granting of named recognition shall be formally documented in a gift agreement, or in the case of university initiated or honorific naming, in a formal memorandum.
- j) The Advancement Office shall be responsible for maintaining and updating an inventory of named facilities.
- k) Naming Policy Guidelines (Appendix A) shall support this policy.

4 APPROVAL PROCEDURES

- a) Approval of the Board of Governors based on the recommendation of the President in consultation with the Director of Advancement, is required for the naming of the following:
 - i) buildings;
 - ii) discrete components of buildings;
 - iii) academic assets such as schools, departments, programmes, institutes or other academic units; and
 - iv) outside physical spaces.
- b) In the case of academic assets set out about in section 4 a) iii, the Director of Advancement shall consult with the President and relevant faculty prior to making any recommendation to the Board of Governors.
- c) Approval of the President and the relevant faculty, based on the recommendation of the Director of Advancement, is required for the naming of the following:
 - i) endowed chairs or professorships;
 - ii) lectures;
 - iii) awards or other forms of recognition of faculty excellence in teaching or research; and
 - iv) student awards and prizes or other forms of student recognition.
- d) Approval of the President, based on the recommendation of the Director of Advancement in consultation with the relevant faculty, is required for the naming of the following:
 - i) smaller physical assets such as classrooms, laboratories, conference rooms, and seminar rooms;
 - ii) literary or artistic collections; and
 - iii) other university initiatives that relate to academic activities that are not otherwise specifically addressed in this policy.
- e) Approval of the President, based on the recommendation of the Director of Advancement, is required for the naming of other university initiatives that are of non-academic nature and not otherwise specifically identified in this policy.

5 REVOCATION PROCESS

Any decision to revoke the naming of a university asset or university initiative, on the grounds that in the opinion of the university the naming damages, or is likely to damage, the university's reputation, shall be made by the Board of Governors based on the recommendation of the President in consultation with the Director of Advancement.

6 RELATED POLICIES

Gift Acceptance Policy
Project Clearance Policy
Prospect Clearance Policy

APPENDIX A: NAMING POLICY GUIDELINES

The following guidelines shall be used in connection with all naming opportunities under the Naming Policy. The Director of Advancement must approve any proposed exception to these guidelines in the first instance, and such exception shall have to be disclosed to the body with final authority for approval. No exceptions to the Naming Policy itself can be made.

1 NEGOTIATING NAMED RECOGNITION

- a) Those negotiating with donors should make it clear to the donor that any naming is conditional upon the approvals set out in the policy.
- b) Section 3 g) of the policy – that the naming cannot imply control over any decision of the university – must be emphasized. This means that even where the donation relates to a physical space or a fund, the naming cannot imply any control over decisions including such things as construction or furnishings, the selection of candidates, research outcomes, curriculum, programming, etc.

2 RESTRICTIONS ON NAME

- a) The university may, with or without giving a reason, decline to attach a name to any asset, initiative or activity to which the Naming Policy applies if, in its opinion, it would not be in the interests of the university to do so.
- b) Notwithstanding that any such asset, initiative, or activity has previously been named, the university may at any time, with or without giving a reason, revoke the naming and remove the name, provided the revocation process set out in the Naming Policy is followed.

3 DURATION OF NAMING

- a) Naming may be granted in perpetuity (subject to the right to remove as set out in the policy) or it may be for a shorter agreed period of time.
- b) Naming in relation to a bequest shall commence when the gift is received in full.
- c) Where an organization name is used, normally the naming period will not exceed 20 years.
- d) Where the university asset, initiative or activity that is the subject of the naming ceases to exist, then the naming ceases to exist. Gift agreements shall cover this eventuality.
- e) The university has the right to remove a donor's name from any entity that has been named in recognition of a benefaction, if that benefaction is not received in full. Typically, the university does not name something until the pledge has been received in full.

4 TYPES OF NAMING OPPORTUNITIES AND FUNDING LEVELS

a) **New buildings**

A building or components of a new building may be named for a benefactor in cases where the donor's gift provides an amount which, in the opinion of the university, is deemed to be substantial, but is in any case not less than 20 percent (20%) of the total fundraising goal from private sources or \$2 million, whichever is greater. In special cases an amount higher than 20 percent (20%) or \$2 million may be established because of the visibility, cost or significance of the building. No amount less than \$2 million will be considered in the naming of a new building. In addition, an effort should be made to raise an endowment equal to 10 percent (10%) of the value of the building towards ongoing operating and maintenance costs for the building.

b) **Existing buildings**

Buildings or portions of building that have not been named may be named for a donor in cases where gifts made by the donor are, in the opinion of the university, sufficiently substantial.

c) **Major renovations of existing buildings**

In cases of major renovations to a building or component of a building or facility, it may be named for the donor, provided the donor's gift covers at least one half (50%) of the renovation cost. However, in special cases an amount higher than 50 percent (50%) may be established depending on the visibility, cost or significance of the building or component of a building or facility.

d) **Schools, departments, programmes or other academic units**

A naming benefaction for these academic assets should be at a level that will transform the nature of the unit involved, enabling the unit to reach a new level of excellence. The amount shall be determined based on a number of criteria for example size and scope of the academic unit and its programs. Consultation with the relevant faculty should be undertaken at an early stage.

e) **Classrooms, laboratories, conference rooms, seminar rooms, etc.**

Funding levels depend on a number of variables including the size and scope of the program, as well as the location and usage of space and market considerations. Consultation with the relevant faculty shall be undertaken at an early stage.

f) **Outside physical spaces**

Name recognition proposed for university roadways, open spaces, landscaping, etc., will require a gift to cover the full cost of the project and a maintenance fund. In special cases an amount higher than the project cost may be established based on visibility or significance of the location.

g) **Endowments**

An endowment fund may be established to provide a permanent source of funding for restricted or unrestricted purposes as specified by the donor.

Normally, the donor shall have up to five (5) years in which to establish the principal threshold. Upon establishment of the principal, the fund shall be held for one (1) year to generate income.

The following guidelines should be used:

Faculty/Academic Positions	Minimum Funding Level
Endowed chair	\$2,500,000
Endowed teaching fellow	\$1,200,000
Student financial assistance	
Undergraduate scholarship	\$25,000
Undergraduate bursary	\$25,000
Graduate scholarship	\$25,000
Merit awards	
Prizes and Medals	\$20,000

Other	
Equipment and Technology Fund	\$100,000
Lecture fund	\$100,000
Book fund	\$10,000