NAMING POLICY FOR THE FLORIDA STATE UNIVERSITY

As Proposed to the Florida State University Board of Trustees, 9-9-2011 Effective Date: 09/09/2011

The following requirements apply to all Florida State University campuses, all satellite facilities and programs, all direct support organizations and governs the naming of academic units, physical structures, or parts of physical structures, administrative positions, faculty positions, excellence funds, athletic coaching positions, scholarships, fellowships, internships, and lectureships. Academic units include academic programs, centers, institutes, departments, schools and colleges. Physical structures include buildings, building additions, collections of buildings, monuments, fields, open-air courtyards, streets, alleys, and other outdoor areas. Portions of buildings (such as classrooms, auditoriums, foyers, libraries) shall be governed by the Naming Opportunities Guidelines.

Any name recommended for consideration under these guidelines must be one that would bring distinction or honor to the University and must be consistent with the values, mission and traditions of the University.

These rules shall be applicable for all naming opportunities, regardless if the donor is an individual, corporation, or foundation.

Definition of Terms:

<u>Word</u> President	Definition President of The Florida State University.
Vice President	Vice President, University Advancement, and President, FSU Foundation.
Unit Head	Dean of an academic unit, dean or head of a satellite campus, president or head of a direct support organization, vice presidents of the University, president of the student body.
Committee	The Committee on Campus Names
Nameable Space	A structure or space that may bear the name of an honoree.
Philanthropic Cost	Total fundraising goal of a project.
Naming Cost	Square footage of the nameable space multiplied by the net square footage cost multiplied by any weighting factors.

1. GENERAL REQUIREMENTS:

- 1.1 When a naming opportunity is presented, strong preference shall be given to persons who have had long, close and valued associations with the University as teachers, administrators, or distinguished and supportive alumni and friends.
- 1.2 Donor recognition does not need to be tied directly to a gift for a specific building or improvement, academic unit or endowment. Donors who support such projects may make their gifts "unrestricted" to the university or to the unit responsible for the private fund-raising. Significant unrestricted gifts can be recognized through naming opportunities.
- 1.3 If fundraising exceeds the philanthropic costs, the additional funds may be applied toward programmatic initiatives within the unit.
- 1.4 Donors should fulfill pledges in seven years or less. Naming will be considered when 50 percent of a pledge is received. A lower percentage or a longer period can be granted in cases where a written gift agreement is binding on the donor's estate, and based on the previous history of the donor.
- 1.5 Once a building, program, or endowment has been named, the name shall not be changed unless there are unusual or compelling reasons for changing the name. The University, through the sole and absolute discretion of its Board of Trustees, may exercise this option if a designated name, in its judgment, should bring discredit upon the University. Failure to complete a pledge shall constitute a reason for changing the name. In the event of such re-naming, the University shall have no financial responsibility, despite anything that may be stated or implied to the contrary.
- 1.6 At no time should promises or commitments regarding naming be made in advance of final approval by the appropriate University entities.
- 1.7 Exceptions to this policy may be made only by the President of the Florida State University, with final approval from its Board of Trustees.
- 1.8 The Florida State University policies on naming shall follow all statutory requirements (*current statue: 267.062*).

2. SPECIFIC REQUIREMENTS - NAMING PHYSICAL STRUCTURES:

- 2.1 Where an individual, corporation or foundation contributes essentially 50% or more of the private philanthropy costs (including both governmental and non-governmental matching gifts) associated with a physical structure or essentially more than 50% of the value of an existing facility, or parts thereof, a name suggested by such contributor for that project will be given serious consideration. If for any reason, the matching gift is not received, the donor is responsible for contributing the full 50% of the cost before naming becomes a consideration.
- 2.2 Where a physical structure already exists or when funding has already been secured for a new construction project, market benchmarks or other factors shall be used to determine the required contribution for naming.
- 2.3 Temporary naming of physical structures may be considered based on the length of period of naming and an assessment of market value associated with the structure.

3. SPECIFIC REQUIREMENTS – NAMING ACADEMIC UNITS:

- 3.1 Where an individual, corporation or foundation contributes significantly in defraying the annual operating costs of a program, center, institute, department or college, a name suggested by such contributor for that project will be given serious consideration.
- 3.2 Market benchmarks and other factors shall be used to determine the required contribution for naming.

4. SPECIFIC REQUIREMENTS—NAMING ENDOWMENTS:

- 4.1 The permanent endowment of a position is a significant and important investment in the long-term viability and strength of a unit. Gifts that establish these endowments can support either administrative or faculty positions, scholarships, fellowships, etc. In addition to supporting the teaching, research and service activities of the unit, funding may cover research expenses.
- 4.2 A minimum gift of \$25,000 is required to create an endowed fund at Florida State University.
- 4.3 Minimum endowment amounts do not include matching funds or grants
- 4.4 Endowment Levels: Minimums for endowed facilities and positions are maintained in the Florida State University Naming Opportunity Guidelines.

5. ADMINISTRATION OF THIS POLICY:

The Vice President for University Advancement shall administer this policy and reference it as appropriate in any written agreement or understanding regarding naming. Schools and units proposing naming thresholds and names for consideration under this policy should present a proposal in writing with sufficient background information to the Vice President for University Advancement. A committee, here named The Committee on Campus Names, shall advise the Vice President for University Advancement at the Vice President's discretion. Approval thresholds are listed under the procedure section of the policy. When appropriate the President shall forward all positive recommendations to the Board of Trustees for final approval. Notification of naming opportunities that do not require Board of Trustee approval will be shared, for information purposes, with the Board during its regularly scheduled meetings. Naming of a physical structure or academic unit, or an endowment must appear as a non-consent item on the Board of Trustees' agenda. The naming of a building, road, bridge, park, recreational complex or similar facility for an existing State University System employee must receive the additional approval of the Board of Governors following approval by the Board of Trustees.

6. PROCEDURES—NAMEABLE SPACE

- Nameable space with a philanthropic cost of \$1 million or greater shall require approval of the naming committee, the president, and the Board of Trustees.
- Namable space with a philanthropic cost of \$100,000 to \$999,999 shall require approval of the naming committee and the president with the exception of prominent public spaces which will require Board of Trustee approval. Prominent public spaces are defined as those with high visibility, heavy usage, or those linked to significant University traditions.
- 6.3 Namable space with a philanthropic cost less than \$100,000 shall require approval of the unit head.

<mark>6.4</mark>	Unit heads will maintain a list of naming opportunities—both available and successfully
	designated—that are a part of their unit. The Vice President will maintain a master list of all
	naming opportunities with proposed gift amounts and identification of the appropriate approva
	entity.

7. THE COMMITTEE ON CAMPUS NAMES:

When requested by the Vice President for University Advancement, naming proposals may be referred to The Committee on Campus Names. This committee shall be composed of the Dean of the Faculties (Chair), the Senior Vice President for Finance & Administration, the Provost & Executive Vice President for Academic Affairs, the Vice President for University Relations, the Associate Vice President for Facilities, an appointee of the Faculty Senate, the President of the Student Body, and an external member appointed by the President. When so requested, the Committee determines the appropriateness of proposals and prepares recommendations to be considered by the Vice President for University Advancement. Recommendations shall be provided within 30 days of the request for submission to the President.

Acknowledged:	Date:

NAMING OF ACADEMIC UNITS, PHYSICAL STRUCTURES OR PARTS OF PHYSICAL STRUCTURES

As Adopted by the Florida State University Board of Trustees, 9-24-2010 Effective Date: 9-24-2010

The following requirements govern the naming (for individuals, corporations, foundations or other entities) of academic units, physical structures, or parts of physical structures at the Florida State University and Florida State University Direct Support Organizations. Academic units include academic programs, centers, institutes, departments, and colleges. Physical structures include buildings, portions of buildings (such as classrooms, auditoriums, foyers, libraries), collections of buildings, monuments, fields, open-air courtyards, streets, alleys, and other outdoor areas.

Any name recommended for consideration under these guidelines must be one that would bring distinction or honor to the University and must be consistent with the values, mission and traditions of the University.

These rules shall be applicable for all naming opportunities, regardless if the donor is an individual, corporation, or foundation.

1. GENERAL REQUIREMENTS:

- 1.1 When a naming opportunity is presented, strong preference shall be given to persons who have had long, close and valued associations with the University as teachers, administrators, or distinguished and supportive alumni and friends.
- 1.2 Donor recognition does not need to be tied directly to a gift for a specific building or improvement or academic unit. Donors who support facilities projects may make their gifts "unrestricted" to the university or to the unit responsible for the private fund-raising. Significant unrestricted gifts can be recognized through naming opportunities.
- 1.3 Donors should fulfill pledges in seven years or less. Naming will be considered when 50% of a pledge is received. A lower percentage or a longer period can be granted in cases where a written gift agreement is binding on the donor's estate, and based on the previous history of the donor.
- 1.4 Once a building or a program has been named, the name shall not be changed unless there are unusual or compelling reasons for changing the name. The University, through the sole and absolute discretion of its Board of Trustees, may exercise this option if a designated name, in its judgment, should bring discredit upon the University. Failure to complete a pledge shall constitute a reason for changing the name. In the event of such re-naming, the University shall have no financial responsibility, despite anything that may be stated or implied to the contrary.
- 1.5 Exceptions to this policy may be made only by the President of the Florida State University, with final approval from its Board of Trustees.
- 1.6 The Florida State University policies on naming shall follow all statutory requirements (*current statue*: 267.062).

2. SPECIFIC REQUIREMENTS - NAMING PHYSICAL STRUCTURES:

2.1 Where an individual, corporation or foundation contributes essentially 50% or more of the private philanthropy costs (including both governmental and non-governmental matching gifts) associated with a physical structure or essentially more than 50% of the

- value of an existing facility, or parts thereof, a name suggested by such contributor for that project will be given serious consideration. If for any reason, the matching gift is not received, the donor is responsible for contributing the full 50% of the cost before naming becomes a consideration.
- 2.2 Where a physical structure already exists or when funding has already been secured for a new construction project, market benchmarks or other factors shall be used to determine the required contribution for naming.
- 2.3 Temporary naming of physical structures may be considered based on the length of period of naming and an assessment of market value associated with the structure.

3. SPECIFIC REQUIREMENTS - NAMING ACADEMIC UNITS:

- 3.1 Where an individual, corporation or foundation contributes significantly in defraying the annual operating costs of a program, center, institute, department or college, a name suggested by such contributor for that project will be given serious consideration.
- 3.2 Market benchmarks and other factors shall be used to determine the required contribution for naming.

4. ADMINISTRATION OF THIS POLICY:

The Vice President for University Advancement shall administer this policy and reference it as appropriate in any written agreement or understanding regarding naming. Schools and units proposing naming thresholds and names for consideration under this policy should present a proposal in writing with sufficient background information to the Vice President for University Advancement. A committee, here named The Committee on Campus Names, shall advise the Vice President for University Advancement at the Vice President's discretion. All recommendations for naming must be approved by the President of the Florida State University. The President shall forward all positive recommendations to the Board of Trustees for final approval. Each naming of a physical structure or academic unit must appear as a non-consent item on the Board of Trustees' agenda. The naming of a building, road, bridge, park, recreational complex or similar facility for an existing State University System employee must receive the additional approval of the Board of Governors following approval by the Board of Trustees.

5. THE COMMITTEE ON CAMPUS NAMES:

When requested by the Vice President for University Advancement, naming proposals may be referred to The Committee on Campus Names. This committee shall be composed of the Dean of the Faculties (Chair), the Senior Vice President for Finance & Administration, the Provost & Executive Vice President for Academic Affairs, the Vice President for University Relations, the Associate Vice President for Facilities, an appointee of the Faculty Senate, the President of the Student Body, and an external member appointed by the President. When so requested, the Committee determines the appropriateness of proposals and prepares recommendations to be considered by the Vice President for University Advancement. Recommendations shall be provided within 30 days of the request for submission to the President.

Acknowledged:	Date:
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MEMO

To: The Florida State University Board of Trustees

From: Tom Jennings, Vice President for University Advancement

Date: August 24, 2011

RE: Request Approval of Revised Naming Policy

The Board adopted its current policy on naming physical structures on September 24, 2010. In November, 2010, I convened four working groups, comprised of staff from the University and the DSOs, to work toward consistent policies and practices among the DSOs. One of these working groups focused on naming practices. Using the existing policy as a starting point, the group made several recommendations to improve our practices.

Attached are three documents for your review. The first item, "Naming of Academic Units, Physical Structures or Parts of Physical Structures (September 24, 2010)" is the existing University policy. The second item, "Naming Policy for the Florida State University (Proposed)," is submitted for the Board's review and approval. The key differences between the existing University policy and the revised policy are highlighted in Yellow, and include the following:

- 1. The new policy also addresses named endowment funds; the existing policy is only about buildings
- 2. Gifts under \$1M for portions of buildings can be handled internally by staff, while gifts for buildings, building additions, public spaces, and internal spaces of \$1M and above go to the Board for final approval after an internal review process.

The proposed policy refers to a "Naming Opportunities Guidelines" document (attached). This is the third item and is intended as an internal document to be used by FSU staff and amended without requiring Trustee approval. It sets certain thresholds for endowment gifts and advises units about how to develop naming prices. The Board is not being asked to approve this document; it is included for information purposes.

We respectfully ask for your approval of the Proposed Naming Policy.



Florida State University Naming Opportunities Guidelines

This document provides guidelines to be used in developing naming opportunities and their associated gift levels at Florida State University. These guidelines will comply with and complement the University's current naming policies established by its Board of Trustees.

GENERAL INFORMATION

DEFINITIONS

Types of Naming:

- 1. Honoring individuals for their exceptional contributions to the university or society;
- 2. Commemorating University history and traditions;
- 3. Honoring long-term and significant financial contributions to the University; or
- 4. Honoring financial contributions to support the entity named.

Applicable Locations:

- 1. All of the Florida State University Campuses
- 2. All satellite facilities and programs of the Florida State University
- 3. All Direct Support Organizations of the Florida State University

Unit Head:

- 1. A Vice President of the University
- 2. President/Head of a Direct Support Organization
- 3. President of the Student Body
- 4. Dean of an academic unit
- 5. Head of a satellite campus

President: President of the Florida State University

Vice President: Vice President of University Advancement of the Florida State University

Committee: Committee on Campus Names for the Florida State University

Namable Space: A structure or space which may bear the name of an honoree.



Philanthropic Cost: Philanthropic cost is the total fund raising goal of the project.

Net Square Foot Cost: Philanthropic cost divided by the net square feet of namable space.

Naming Cost: The square footage of the namable space multiplied by the net square foot cost multiplied by any weighting factors.

Entities Requiring Trustee Naming Approval: All facilities and programs that require trustee naming have been identified in the policy document titled "Naming of Academic Units, Physical Structures or Parts of Physical Structures" that was adopted by the Florida State University Board of Trustees on September 24, 2010. They include but are not limited to:

- Buildings
- Additions
- Wings
- Fields
- Plazas
- Malls
- Parks
- Streets
- Drives
- Stadiums
- Colleges
- Schools
- Departments
- Centers
- Institutes
- Programs

Entities requiring Unit Head approval: Entities requiring Unit Head approval include, but are not limited to:

- Administrative positions
- Faculty positions (also requires President's Approval via VP & Committee)
- Excellence funds
- Athletic coaching positions
- Small interior spaces (classrooms valued at <\$100,000, offices, lockers, etc...)
- Scholarships suggested minimum \$25,000
- Parts of landscaping projects
- Graduate Fellowships suggested minimum \$25,000
- Travel Fellowship or Fund suggested minimum \$25,000
- Technology Fund suggested minimum \$50,000
- Literature Fund suggested minimum \$25,000
- Internship suggested minimum \$50,000
- Research Award suggested minimum \$100,000
- Distinguished Lectureships suggested minimum \$100,000



• Endowed Lectureships – suggested minimum \$25,000

PROCEDURE

Each Unit Head will maintain a list of naming opportunities – both available and successfully designated – that are a part of their unit. The Vice President will maintain a master list of all approved naming opportunities – both available and successfully designated – with proposed gift amounts for the naming rights and identification of whether the naming opportunity requires approval by the Board of Trustees or the Unit Head. For naming opportunities requiring Board of Trustee approval, procedure will follow those outlined in the document "Naming of Academic Units, Physical Structures or Parts of Physical Structures" adopted by the FSU Board of Trustees, dated September 24, 2010. For naming opportunities requiring Unit Head approval, a written request will be presented to the Unit Head, who will perform due diligence to ensure the individual(s) would bring distinction or honor to the University and ensure that the individual(s) are consistent with the values, mission and traditions of the University. The Unit Head will request approval from the Vice President, who will obtain approval by the President. The Unit Head is responsible of notifying the Vice President of each completed naming.

FACILITIES

Facilities may be named for non-donors and those making donations. This section addresses the naming guidelines for both.

NAMING TO HONOR NON-DONORS

Facilities may be named to honor individuals who have made extraordinary contributions to the University or to society if the following two criteria are satisfied:

- 1. The individual has had University-wide influence, or the individual has made exceptional contributions to the nation or world
- 2. Two years have passed from the time the honoree has died or been separated from the role with the University for which the person is to be honored

Names of individuals meeting these criteria or names commemorating University history or tradition may be submitted to the Vice President by a Unit head, President of the University or University Trustee. Procedures will follow those outlined in the document titled "Naming of Academic Units, Physical Structures or Parts of Physical Structures" that was adopted by the Florida State University Board of Trustees on September 24, 2010.

THE FLORIDA STATE UNIVERSITY

SUGGESTED PROCESS FOR DETERMINING THE COST OF NAMEABLE SPACES

As a starting point, the cost to name the space should be more than 50% of the philanthropic value.

The University may, at its discretion, decide not to use the 50% philanthropic cost guideline for building projects that are funded primarily or significantly with state resources or other University resources. This will prevent the situation in which, for example, a donor may ask to name a building that cost \$100M—of which \$10 million is funded through philanthropy—with a \$5 million gift (half the philanthropic cost, but only 5% of the total cost). The scenario described above provides such a comparative "bargain" for naming a building that it will be unfair to other donors. In such instances the University may put more weight on benchmarks.

Determining the pricing of landscape elements may go through a similar process as described above. However, many landscape features offer high visibility but lower construction costs than building spaces. The naming price of these public spaces may be considerably higher than comparably sized spaces in an adjacent building.

The costs of items without square footage assigned should be assessed by the unit on a case by case basis.

When developing a comprehensive set of naming opportunities in a building project, the total of all of the naming opportunities should be 2 to 3 times the total fund-raising goal. The total inventory of nameable spaces is seldom used up by donors, so having a total inventory this large helps ensure that the maximum number of spaces are named as a result of gifts. In addition, if the gift agreements are written to allow the gifts to be "unrestricted," and if the amount received exceeds the cost of construction and furnishings, it is possible that the additional amount can be applied toward programmatic initiatives in the unit. In this case, the recognition device for the donors is separate from the actual gift purpose, and the University chooses to recognize the gift in the building.

Suggested Process Determining Price Points for Naming for New Building Projects

- 1. Gather Material about the project or program
- 2. Create a list of the entities available to be named
- 3. Separate those entities into those requiring Trustee Approval, and those needing only Unit Head approval.
- 4. Determine mix of funding sources: State sources, private funding, institutional borrowing, student fees, etc.
- 5. Determine the size, location, and function of each space to be named.



- 6. Determine if the space will require an extraordinary amount of equipment maintenance and/or replacement.
- 7. Identify benchmarks: Collect naming opportunities from other recent and current projects at the Florida State University as well as examples from similar building projects at peer universities.
- 8. Determine the naming cost (see definitions).

Weighting Factors

Determining appropriate gift levels for each naming opportunity requires weighting factors including, but not limited to those listed below.

- Public spaces and areas with higher traffic are more valuable than private spaces.
- Rooms that connect to, or are adjacent to, public, high-traffic areas are more valuable than rooms that do not.
- Locations accessible to the general public generally are worth more.
- Spaces and programs that are unique or special are more valuable than those that are numerous. In general, the smaller the supply, the higher the price.
- Spaces and programs that service or support the unit program (i.e., classrooms, laboratories, etc.) are generally more valuable than spaces that service individuals (i.e., offices).
- Spaces containing windows or doors with scenic views are worth more than those without scenic views.
- Spaces with more architectural detail and décor are worth more than those with lesser appointments.
- Entities that are associated with a popular, high profile program are more expensive than lesser profile program.
- Entities with few prospective donors are less expensive than those with a large prospect base.
- Entities that require an extraordinary amount of equipment maintenance and/or replacement should be more expensive and may require a separate endowment gift.

Weighting Factors – an example

- 1. A plus or minus factor can be assigned as a multiplier to the calculated philanthropic cost to derive a final gift level for a naming opportunity. For example, imagine there are two rooms exactly the same size in a building, each having a philanthropic cost of \$150,000. One is an interior space that houses office equipment and intern cubicles. The other is a well-appointed conference room just off the lobby that is used by the executive staff. The second space could be assigned a higher weighting factor than the first (those weighting factors determined by the Unit or Director) so that each reflects the nature of work done within that space.
- 2. Round the resulting value to the nearest natural price point. For example, \$50,000 rather than \$49,123.



- 3. Compare the resulting prices to benchmarks at the Florida State University and to similar facilities at similar institutions.
- 4. Prepare a document/table that shows how the value of each space was determined.

ENDOWED POSITIONS

The permanent endowment of a position is a significant and important investment in the long-term viability and strength of an academic unit. Gifts which establish these endowments can support either administrative or faculty positions.

ENDOWED ADMINISTRATIVE POSITIONS

Specific administrative positions at Florida State University may be endowed. These include the deanship of a college or other unit, a department chairmanship, the directorship of a research center or institution. In addition to supporting the teaching, research, and service activities of the unit, funding for an endowed administrative position may cover research expenses for the active research program of the holder. The minimum amounts for the endowed positions listed below do not include matching grants which may be available to enhance the endowment. These minimums should be updated a minimum of every 7 years. These endowments are identified to serve as salary supplements and are not sufficient along to fund a new position.

Endowed Deanship

\$3,000,000 (minimum)

Endowed deanships provide flexible resources to deans, university librarians or similar administrative leaders to meet special needs and opportunities, and to enhance resources and services.

Endowed Regional Dean

\$2,000,000 (minimum)

Florida State University has regional campuses throughout Florida and the world. Endowing a regional dean's position supports local programming at an individual campus.

Endowed Department Chair or Unit Directorship \$1,000,000 (minimum) An endowed department chair or unit directorship supports teaching, research and service activities of the department, research center or institution.

ENDOWED FACULTY POSITIONS

An endowed faculty chair or professorship allows Florida State University to attract and retain outstanding faculty. Earnings from the endowment may support the position with a salary stipend and/or provide funds for teaching, research, conference travel and other activities related to scholarly work.



Endowed Distinguished Scholar Chair

\$2,000,000 (minimum)

Distinguished Scholar Chairs are designed to attract the most prestigious eminent scholar-teachers to Florida State University. The income from the endowment supplements the faculty member's salary so that it is nationally competitive. It also provides attractive resources for research and teaching, often including funding for graduate students who work under the leadership of the Distinguished Scholar Chair.

Endowed Eminent Scholar Chair

\$1,000,000 (minimum)

Endowed Eminent Scholar Chairs are designed to attract nationally recognized expert scholar-teachers to Florida State University. The income from the endowment supplements the faculty member's salary so that it is nationally competitive and provides attractive resources for research and teaching.

Endowed Professorship

\$150,000 (minimum)

Endowed professorships provide a salary supplement and / or support the research and teaching of the named professor the university wishes to attract or retain. While the minimum to create an endowed professorship is \$150,000, some academic disciplines may require a higher amount to assure that the salary is competitive within the field.

Endowed Visiting Professorship

\$100,000 (minimum)

A visiting professorship is designed to attract outstanding faculty to Florida State University for a specific period of time to teach, lecture and/or conduct research.

Endowed Early Career Faculty Excellence Award \$100,000 (minimum) An endowed early career faculty excellence award helps fund the professional development and retention of emerging faculty with high degrees of potential.

ACADEMIC UNITS

Within each unit's list of naming opportunities shall include, in the judgment of the Unit Head (and other relevant administrators), opportunities that would lead to a substantial improvement in the national stature of the unit. For example, a department or college could include the following core areas in an improvement plan and estimate the endowment required to support each of these actions.

- Endowed faculty positions
- Other awards to retain and develop faculty
- Student support
- Innovative programs to improve graduate-level education
- Innovative programs to improve undergraduate-level education
- Targeted programs for expansion



It should be noted that this exercise requires each unit to document what additional resources are required to substantially improve its performance. It is not, however, a straightjacket that requires a donor to fund a specific "bundle" of improvements. For example, a college might desire a 50% increase in its funding of graduate students but it may also recognize that a 25% increase would also materially improve its competitiveness in recruiting the nation's top graduate students.

Naming an Academic Unit – an example

An academic unit has identified a naming opportunity and proposes that three-quarters of the naming gift be unrestricted to provide discretionary spending for the unit's administration. The unit defines "restricted" in this case as any portion of a gift going towards initiatives outside of the original proposed list of unit priorities. For example, if a donor wanted to start a new (approved) program within the unit, but the new program would not materially improve the unit, no more than 25% of the naming gift could be dedicated to that new program. (The 25% going towards the new program would be considered "restricted" in this case.) However, if a donor requests that large portions of the naming gift be used for specific aspects of the unit's proposed list of priorities, this donor's gift would not be viewed as restricted.

ADDITIONAL GUIDELINES AND RECOMMENDATIONS

In addition to the naming of facilities, positions, units and student support, this section addresses other topics which may be germane during the naming process. Specifically, this section addresses assessments of the donor base, donor recognition, programmatic and facility changes, and gift agreements.

ASSESS THE DONOR BASE

A critical factor in developing naming opportunities is determining the financial capacity of prospective donors. It is recommended that each unit develop a process by which it identifies prospective donors at various giving levels and develops naming opportunities that match those levels. This ideally would contain enough naming opportunities at a variety of levels to fully engage the prospective donors. In general, more price-points are better.

DONOR RECOGNITION DEVICES

Donor recognition devices should be considered during the inception of fundraising projects. They should be created at some stage in the architectural design process so they are consistent with the building's architecture. They must also be consistent with the University's policies regarding aesthetics and signage. Additionally, it is prudent for the Unit to



determine recognition levels, floor plans and strategies by which to help donors identify and enjoy their recognition.

PROGRAMMATIC AND FACILITY CHANGES

Providing donors with an honor such as naming a space or program after them requires both the University and the academic Unit to respect the donor's gift and their intention. With regards to physical spaces, the name is intended to remain for the life of the entity regardless of any subsequent change. However, if a facility is razed or an academic or athletic unit is discontinued at some future date, the University will recognize the honoree in an appropriate way.

GIFT AGREEMENTS

Any gift agreement or letter referring to a naming opportunity should include timing and donor requirements for the naming; naming device; wording on the naming device and length of time of the naming. The gift agreement should also include language that the agreement is subject to the naming policy of the university.