



Policy Title	Naming Policy
Issued By	Advancement Office
Contact	Executive Director, Advancement & Alumni Relations
Approved By	Board of Trustees
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**Purpose:**

This policy outlines the guidelines for granting namings at Brescia University College (“Brescia”). The purpose of naming opportunities is to honour individuals, corporations, foundations, organizations and other entities whose generous contributions make possible the advancement of important University initiatives or to honour individuals or organizations for distinguished service to the University or society in general.

**Application:**

This policy applies to the naming of the following entities:

- **Endowed Funds** (programs of research, teaching or service).
- **Student Awards** (scholarships, awards and bursaries for graduate and undergraduate).
- **Buildings and Building Components** (wings, lecture halls, classrooms, laboratories, or other locations on campus).
- **Academic Positions** (Chairs, professorships, lectureships, lecture series, awards for excellence in teaching, research, or performance of other academic responsibilities).
- **Collaborative Research** (research groups, centres, institutes, collections of books or information resources; endowed publication grants for books not designated as part of a series, and awards for outstanding publications).
- **Academic Entities** (Faculties, Schools, Departments, Programs).
- **Other initiatives** the University may see fit to name in order to perpetuate the name of a benefactor.

**General:**

1. Naming Principles

- a) Namings may be approved in the name of a donor, a third party at the request of the donor, or to honour an individual or organization for distinguished service to the University or society in general.

- b) Namings may be approved to recognize a donor's current expendable gift, endowed gift and gift-in-kind. Funding may extend over an agreed length of time, and such namings may be in perpetuity or time limited. Namings proposed in recognition of planned gifts (bequests) will be submitted for approval when the gift is realized.
- c) Namings should enhance the profile and image of the University. No naming will be approved or (once approved) continued that will or is reasonably likely to undermine public respect for the University.
- d) Where a facility or facility component has been named, the University will continue to use the name so long as the facility or component remains in use and serves its original function. When the use of a facility or component changes substantially as a result of academic restructuring, renovation or demolition or other reasons, the University may retain the use of the name, name another comparable room or facility, or retire the use of the name.
- e) A donor may request a change in a naming if, for example, a corporate donor has changed.
- f) Periodically the University and Advancement Office may provide the honorary naming of an asset in recognition of a person/group/organization's contribution to the University. At the approval of the Principal and Executive Director Advancement and Alumnae Relations, the naming term for the honorary naming of an asset shall be for as long as the University operates on the same land.
- g) Advancement will maintain an inventory of all approved namings.

## 2. Additional Naming Considerations

- a) A decision to erect a building, establish a Faculty, school, department, chair or professorship, begin a new academic program, etc. is to be taken on the basis of the usual academic and other criteria, and approved in the usual manner, as prescribed by the Board of Trustees.
- b) Gifts received that qualify for matching gift programs may be considered for a naming opportunity equal to the value of the gift plus the matching funds leveraged up to a maximum 4:1 match.
- c) Namings will be independent of all appointment, admission and curriculum decisions.
- d) No naming should infringe on academic integrity or be deemed to imply the University's endorsement of a partisan political or ideological position or of a commercial product or service. This does not preclude naming for an individual who has at one time held public office or with the name of an individual or company that manufactures or distributes commercial properties, which has made a philanthropic contribution.
- e) No corporate logos will be used for recognition purposes on buildings or signs, or in association with any print or electronic materials, unless proposed by the Executive

Director of Advancement and Alumnae Relations and subject to the approval process for namings.

- f) Except in those cases where approval of a naming requires consideration by the full Board (i.e., naming of a building, naming of an academic entity), unless stated otherwise in this policy or in other referenced policies, and where a proposed naming is in conformity with the relevant Board policies, the authority to approve a naming is delegated to a Subcommittee comprised of the Principal, Executive Director Advancement and Alumnae Relations and Chair of the Advancement Committee. Such approvals will be reported on a regular basis for information to the Board through the Advancement Committee. At its discretion, the Subcommittee may determine that a particular proposal should be forwarded to the full Institutional Planning or Finance, Audit & Investment Committee for information.

### 3. Honorific Naming

- a) Proposed honorific namings (for non-financial contributions) must be reviewed by the Executive Director Advancement and Alumnae Relations or designate to ensure that opportunities for significant philanthropic contribution are not eliminated through the honorific naming before submission for approval.
- b) In some circumstances, namings may be approved to honour outstanding service by current, retiring or retired members of faculty or staff, subject to the review outlined in paragraph 3(a).

### 4. Changes to Approved Namings and/or Use of Endowed Funds

- a) If through the passage of time Brescia or the needs of society would be better served by altering any naming or changing the use of any named endowed fund, the University will consult with the donor, heir or designated successor. If no such contact is possible, the University will make the change, adhering as closely as possible to the donor's original intent.
- b) Where a facility or facility component has been named, the University will continue to use the name so long as the facility or component remains in use and serves its original function. When the use of a facility or component changes substantially as a result of academic restructuring, renovation, demolition or other reasons, the University may retain the use of the name, name another comparable room or facility, or retire the use of the name.
- c) A donor may request a change in a naming if, for example, a corporate donor has changed its name, or an individual donor has changed his or her name. The University may request that the donor bear any associated expenses with the change, such as a change to signage.
- d) Changes to namings must be submitted through the same approval process as for the original naming.

## 5. Removal of Donor Names

- a) Notwithstanding any other provisions in this Policy or other policies, a donor name for a supported project (including, for example, academic positions, student awards and campus buildings), will not be approved, or if approved will be revoked, if the name will or is reasonably likely to undermine public respect for the University. Ultimate authority to revoke an approved name rests with the Board of Trustees on the recommendation of the Principal.

## **Policy**

### Types of Naming Opportunities

#### 1. Endowed Funds

- a) A minimum gift of \$25,000 is required to name an endowed fund.
- b) Naming of endowed funds and any exceptions to the minimum level of the fund, will be approved by the Executive Director, Advancement and Alumnae Relations or designate. Any exceptions will be reported to the Advancement Committee.
- c) Where an endowment has been established with a donation to continue or preserve an entity that has been named, the University will use its best efforts to maintain the capital value of the endowment in order to perpetuate what has been named (see Endowment Management Policy dated June 2017).

#### 2. Student Awards

- a) A minimum gift of \$25,000 for endowment is required to name a student award in perpetuity.
- b) For the naming of annual expendable scholarships, awards and bursaries, the minimum expendable gift of \$1,500 for each of five years, for a total gift of \$7,500, is required to name a student award for the five-year term of the award. Alternatively, a student award may be named if the total value of the gift meets the \$7,500 minimum over a term of less than five years (for example, an award of \$3,750 annually for each of two years).
- c) Undergraduate and graduate scholarships, awards, bursaries, student fellowships and prizes are named, in accordance with Administrative guidelines for Scholarships, Awards, Bursaries and Prizes. For the purposes of this policy, the term “student award” is used to refer to any of the above.
- d) Exceptions to the above minimum, including named prizes, may be made at the discretion of the Executive Director, Advancement and Alumnae Relations or designate and any exceptions will be reported to the Advancement Committee. Donors wishing to contribute below the minimum will be encouraged to direct their gifts to a

general fund in support of student awards.

- e) Naming and criteria of student awards must conform to the Ontario Human Rights Commission Policy on Scholarships and Awards, which generally prohibits awards based on criteria such as race, ancestry or religion, and to policies approved from time to time by the University.

### 3. Buildings and Building Components

- a) For recognition by naming of a building or building component, it will be expected that the benefactor, or other contributors wishing to honour an individual benefactor, will provide all or a substantial part of the cost of such entity:
  - i. Namings will be considered at an appropriate value, obtained by review of best practices and recent namings at the University and similar academic institutions across North America or elsewhere as relevant. It is the responsibility of the Executive Director Advancement and Alumnae Relations or designate to determine the appropriate gift level for naming, beginning at a minimum of \$10,000.
  - ii. For the naming of a new or existing building, facilities within buildings, (i.e. classrooms, laboratories, etc.) or for renovated facilities a contribution in the range of 30% of the total cost of construction/renovation including furniture and equipment is recommended. The University would also encourage the benefactor to consider endowing the maintenance costs.
  - iii. Namings associated with a particular building will not preclude further naming within the building.

### 4. Academic Positions

- a) Academic Chairs, Professorships and Designated Faculty Fellowships are named in accordance with Administrative guidelines for required level of support for these positions as outlined in Appendix 1.

### 5. Collaborative Research

- a) Namings will be considered at the appropriate values, determined through review of best practices and recent namings at the University and similar academic institutions across North America or elsewhere as appropriate. It is the responsibility of the Executive Director Advancement and Alumnae Relations or designate to determine the appropriate gift level for naming, and to consult with the Vice-Principal and Academic Dean on the amount and naming.
- b) Recommendations to name a collaborative research entity are submitted jointly by the Executive Director Advancement and Alumnae Relations and the Vice-Principal and Academic Dean to the Subcommittee described in paragraph B.2. (e), above.

- c) It is recognized that the term “Centre” has broad meaning, and use of the term as part of a naming for a building, building component or other similar facility at the University is not strictly limited to a formally approved collaborate research entity.

For naming of special collections; series of publications by the University, division or department; endowed publication grants for books not designated as part of a series, and awards for outstanding publications, the minimum endowment is \$10,000. This amount is subject to change by the Executive Director, Advancement and Alumnae Relations, in consultation with the Director, Library Services.

## 6. Academic Entities

- a) Faculty, school, department and other academic entities may be named. Naming of an academic entity is a sensitive matter and must be given due consideration by the Principal and Vice–Principals, Executive Director, relevant Dean(s), Brescia Council and the Board of Trustees and their relevant committees, as well as other academic and administrative departments of the University as appropriate.
- b) Namings will be considered at the appropriate values, determined through review of best practices and recent namings at the University and similar academic institutions across North America or elsewhere as appropriate. It is the responsibility of the Executive Director, Advancement or designate to determine the appropriate gift level for naming.
- c) Namings associated with a particular academic entity will not preclude further naming within the entity.
- d) Namings of academic entities must be approved by the Board of Trustees upon the recommendation of the Principal after appropriate consultation with Brescia stakeholders.

## 7. Other Naming Opportunities

- a) Other naming opportunities are available at the University in recognition of a distinguished person or donor, including but not limited to: lectures and lecture series, collections of books or art, research objects, decorative items or other ornamental structures, programs of service or recreation and the like.
- b) Such namings normally require a gift to cover the full cost of the project, the cost of any plaques or other recognition, and a maintenance fund if required.
- c) Approval for these and other miscellaneous opportunities is the responsibility of the Executive Director Advancement and Alumnae Relations or designate, in consultation with relevant senior administrators.

## **Authority**

1. All proposals for naming in respect of gifts in excess of \$10,000 shall be forwarded to the Executive Director Advancement and Alumnae Relations, who shall make a determination whether the proposed naming conforms to this policy, is otherwise appropriate, and is of sufficient merit.
2. All naming proposals for buildings will be referred to the Board of Trustees and when naming proposals raise issues that in the Principal's judgment require the Board's consideration, the Principal will bring such proposals to the Board.
3. Approval of this policy and subsequent revisions to the policy rests with the Board of Trustees.

### **Jurisdiction**

This policy is under the jurisdiction of the Executive Director Advancement and Alumnae Relations.

## APPENDIX 1

### GENERAL GUIDELINES FOR REQUIRED LEVEL OF SUPPORT FOR NAMING CHAIRS, PROFESSORSHIPS, FACULTY FELLOWSHIPS & SCHOLAR AWARD

The required level of support for a Chair, Professorship, Faculty Fellowship or Scholar at Brescia University College will vary with the circumstances and the objectives to be achieved. However, as a guideline, the minimum level of support that will be required is as follows:

#### **Chair**

Non-Endowed: Minimum of \$600,000; \$120,000 x 5 years

Endowed: Minimum \$3,000,000

Term Endowed or Term Non-Endowed: Annual minimum funding equivalent to the amount available for spending on a \$3 million endowed fund (original capital value), in accordance with the Endowment Management Policy dated June 2017.

#### **Professorship**

Non-Endowed: Minimum of \$300,000; \$60,000 x 5 years

Endowed: Minimum of \$1,500,000 to \$2,999,999

Term Endowed or Term Non-Endowed: Annual minimum funding equivalent to the amount available for spending on a \$1.5 million to \$2,999,999 endowed fund (original capital value), in accordance with the Endowment Management Policy dated June 2017.

#### **Fellowship**

Non-Endowed: Minimum of \$100,000; \$20,000 x 5 years

Endowed: Minimum of \$250,000 to \$1,499,999

Term Endowed or Term Non-Endowed: Annual minimum funding equivalent to the amount available for spending on a \$250,000 to \$1,499,999 endowed fund (original capital value), in accordance with the Endowment Management Policy dated June 2017.

#### **Scholar Award**

Non-Endowed: Minimum of \$25,000; \$5,000 x 5 years

Endowed: Minimum of \$100,000 to \$250,000

Term Endowed or Term Non-Endowed: Annual minimum funding equivalent to the amount available for spending on a \$100,000 to \$250,000 endowed fund (original capital value), in accordance with the Endowment Management Policy dated June 2017.

*The above minimum levels of support are subject to periodic review and may be amended from time to time. Amended minimum levels of support are generally applicable to the establishment of new Chairs, Professorships, Fellowships and Scholars following the approval of such changes and do not apply to previously funded positions.*