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Parent Policy: [Naming Policy](#)

Philanthropic Naming Of Physical Entities Procedure

Office of Administrative Responsibility:	Office of Advancement
Approver:	Vice-President (Advancement)
Scope:	Compliance with this University procedure extends to all members of the University community and any organization that intends to raise funds in the name of, or on behalf of, the University.

Overview

Philanthropic naming of **physical entities** recognizes donations to the University from individuals, corporations, organizations and foundations. Philanthropic naming recognizes donations made over time as well as donations made for a specific purpose or at a specific point in time.

All donations must meet the requirements of the Donation Acceptance Policy and shall be compatible with the vision, mission and values of the University of Alberta.

Purpose

This procedure outlines the steps that must be followed in the philanthropic naming of physical entities.

PROCEDURE

A **Naming Opportunities Plan (NOP)** must be submitted to the Vice-President (Advancement) for a confidential review and approval, and approval by a **president's executive committee**. The NOP will be part of a business case for a new or renovated facility, when possible. The Office of Advancement will work with the Office of Facilities and Operations to ensure consistent standards across campus, in accordance with existing policies and guidelines.

Once the business case for a new or renovated facility has been approved by the president's executive committee, academic or administrative units will work with the Office of Advancement to develop a written and mutually agreed upon fundraising plan for the physical entity (before engaging in conversations with potential donors) and ensure that the naming of spaces within the proposed physical entities aligns with the University's mission and vision.

1. IDENTIFYING OPPORTUNITIES FOR NAMING

- a. The Office of Advancement, in consultation with academic or administrative units, shall develop a NOP when seeking donations for naming physical entities.
 - i. The Office of Advancement will meet with the faculty to develop an NOP to identify spaces and opportunities for naming.
 - ii. The Office of Advancement will work with the Office of the University Architect to develop the design for signage placement and style.
- b. The NOP must include:
 - i. A letter of support from the dean, director or chair with specific information on the purpose, fundraising goal, current status, impact on campus; and
 - ii. A list of naming opportunities, detailing proposed minimum ask amounts as defined by construction cost, location, visibility and marketability, and may include areas that are better suited for honourific namings, where appropriate.

c. NOP approval:

- Naming opportunities for newly constructed or renovated physical entities will be approved by the president's executive committee, at the recommendation of the Vice-President (Advancement). Naming levels will be based on the cost of the facility, which is based on the overall budget. Exceptions to this policy may be made by the President.
- Upon approval of the NOP, the Vice-President (Advancement) will inform the Board University Relations Committee and Board Finance and Property Committee. The successful academic or administrative unit may proceed to secure private sector contributions for naming opportunities.
- Approval of the NOP does not constitute approval of the naming opportunities contained therein. Specific proposed names must be submitted to the Vice-President (Advancement) for approval.

2. PROPOSING A NAMING OF A PHYSICAL ENTITY and SECURING DONATIONS

- a. Academic or administrative units must act in accordance with the *Prospect Management Policy* and *Donation Acceptance Policy* when seeking philanthropic support for naming physical entities.
- b. The Office of Advancement shall maintain the master list of Naming Opportunities.
- c. The **Philanthropic or Honourific Naming Proposal** must include:
 - i. A letter of request for naming from the appropriate dean or director, indicating faculty support for the name, and stating that all donations meet the requirements of the *Donation Acceptance Policy*;
 - ii. Where applicable, the completed NOP which indicates initial ask amounts, actual donation amounts, donors' names, and a brief description of donor.
- d. An academic or administrative unit may choose to accumulate named donation proposals and submit the Philanthropic or Honourific Naming Proposal in the form of a list for approval by the Board University Relations Committee by means of a single motion.
- e. The completed Philanthropic or Honourific Naming Proposal will be submitted to the Vice-President (Advancement) for review and endorsement. Upon approval, the academic or administrative units can secure donations for the physical entity.

3. GOVERNANCE

- a. Named donation proposals that are determined by the Vice-President (Advancement) to have campus-wide implications, will be brought forward to the **Donation Acceptance Committee** and **key stakeholder groups** for confidential consultation prior to Board University Relations Committee approval.
- b. The Vice-President (Advancement) will present the Philanthropic and Honourific Naming Proposal to the Board University Relations Committee (in-camera), for approval.
- c. Exceptional namings must be submitted to the Board University Relations Committee as a separate Honourific and Philanthropic Naming Request Proposal, and not part of a list. Exceptional namings are defined as those involving a facility or a University structure with external signage. Signage will be affixed once one-third (33 percent) of a pledge has been received, unless irrevocable provisions have been made.
- d. The Board University Relations Committee, in consultation with the Vice-President (Advancement), will consult with key stakeholders and may choose to present exceptional namings (i.e., involving a controversial donation, a facility or major part of a facility with external signage, or an academic unit) to the Board for review and approval.
- e. Individual named donation proposals which are time sensitive or not part of an approved NOP, may be brought forward at any time to the Vice-President (Advancement) for approval who will then consult with key stakeholders.

- f. All Honourific and Philanthropic Naming Proposals will be treated as confidential, and announcements regarding the naming shall be done only after Board of Governors approves the proposed naming, and only then, with the knowledge of the donor.

4. COMMUNICATION

- a. The Office of the Vice- President (Advancement) will confirm Board approval of the Philanthropic or Honourific Naming Proposal with the appropriate academic/administrative units. Confirmation of the approved Philanthropic or Honourific Naming Proposal is required prior to public announcements or formal celebrations of named donations.
- b. The Office of Advancement will ensure the appropriate parties are notified of any naming or renaming.
- c. The Office of Advancement will ensure the appropriate recognition events and public notice and/or recognition activities take place.

5. TIME LIMITS AND REVOCATION OF NAMINGS

- a. The expected timeframe for the naming of a facility is 30 years. The units within the Office of the Vice-President (Advancement) portfolio shall ensure that donors understand that namings are time-limited; and that this limitation is at the discretion of the University, the academic or administrative unit, or the donor. Namings also may be revisited and reconsidered in circumstances where a naming is no longer in the best interests of the University and/or the donor. Donors will indicate in the Donation Agreement that they understand and agree that namings are time-limited.
- b. Namings will be in the best interest of both the University of Alberta and the donor; if a naming is deemed to no longer be in the best interest of the University of Alberta or the donor, it is possible that the University, the donor and/or the donor's family may request to have a naming revoked, following consultation with the Vice-President (Advancement).
- c. Should a building be demolished or replaced, then a request for a new honourific naming opportunity may be considered. Where possible, the Office of Advancement will contact a family member and/or the appropriate contact person for the former namesake to inform them of the decision to demolish or replace the facility. The Office of Advancement maintains the list of approved philanthropically named spaces, and will provide the list of donors to the previous facility and the Office of University Relations for consideration of honourific naming opportunities.
- d. Revoking of a naming must be approved by the Board of Governors.
- e. When it is requested that a named physical entity within a building be relocated within the same building or to a different building, and the new facility or room will serve the same original purpose, requests are directed to the Vice -President (Advancement) for approval.

Steps:

1. Complete the Naming Opportunities Plan and submit to the Vice-President (Advancement) for approval
2. Develop a fundraising plan with Office of Advancement
3. Solicit and confirm donation agreements
4. Submit the Philanthropic or Honourific Naming Proposal to Vice-President (Advancement) for recommendation for approval to the Board University Relations Committee. However, if the proposed naming is considered exceptional, the proposal may be presented to the Board of Governors for review and approval.
5. Once approved by the Board University Relations Committee, the Office of the Advancement communicates the naming to the appropriate portfolios and relevant units.

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended

institution-wide use. ▲Top	
Philanthropic	The act of philanthropy; generally defined as donations to the University which have real or in-kind monetary value.
Physical entities	Physical structures (i.e., buildings) and their internal components including, but not limited to, wings, floors, classrooms, lecture theatres, laboratories and common areas. Also includes common and special purpose grounds and agricultural and horticultural lands, parking facilities, roadways, etc.; any identifiable landmark. Physical entities are determined by the Office of the University Architect
Naming Opportunities Plan	A Naming Opportunities Plan refers to a plan for the naming of physical entities in conjunction with a plan or campaign to secure private sector contributions.
President's executive committee	A committee comprised of the president, the vice-presidents of each portfolio, and General Counsel.
Philanthropic or Honourific Naming Proposal	A proposal outlining the request for a philanthropic or honourific naming that includes a range of criteria reflected in the Philanthropic or Honourific Naming Proposal Form.
Donation Acceptance Committee	Convened by the Vice-President (Advancement) and including representatives from all vice-presidential portfolios and other relevant staff and academic leadership, the committee reviews and assesses potential donations that do not conform to donation guidelines described in the Donation Acceptance Policy.
Key stakeholder groups	Any committee, group, association (AASUA/NASA) or portfolio that is identified as having an interest in the topic for consultation. (e.g. Deans' Council, Students' Union, GSA)

FORMS

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[Philanthropic Naming Opportunities Plan](#)

[Philanthropic or Honourific Naming Proposal Form](#)

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[Naming of Academic Entities – Appendix B – Endowed Chairs and Professorships – Criteria, Terms and Responsibilities](#)

[Naming Policy - Appendix A – Naming Criteria](#)

[Prospect Management Policy](#)

[Signage Policy](#)

[Strategic Alliance Policy](#)