

\* - indicates a required field.

<b>* POLICY NAME:</b>	<b>Named Gift Policy</b>
<b>* POLICY TYPE:</b>	Presidential Policy - University Administrative Policy
<b>POLICY #:</b>	G.2.2
<b>*STATUS:</b>	Active
<b>*CONTACT OFFICE:</b>	University Advancement
<b>*OVERSIGHT EXECUTIVE:</b>	Vice President for Advancement and University Relations
<b>*APPLIES TO:</b>	Senior Administrators, Advancement gift officers and staff
<b>*PURPOSE:</b>	The University of Mary Washington encourages alumni and friends of the University to name permanent physical facilities, established organizations and other individual honors after a donor, family member, friend, alumni class, corporation/foundation, and/or a distinguished faculty or staff member.
<b>DEFINITIONS:</b>	
<b>*POLICY STATEMENT:</b>	<p>This policy is established to provide for a coordinated and informed system of naming to ensure the appropriate recognition of the traditions of the University, including the opportunity to honor and acknowledge its distinguished alumni, friends, and benefactors. Thorough consideration must be given to associating any name with the excellent quality and reputation of the University of Mary Washington and in deciding which naming opportunity is most suitable. Therefore, this policy is intended to ensure proper selection, vetting, and consultation prior to making such decisions.</p> <p>1) This policy applies to the naming of all (a) permanent physical facilities, (b) established organizations (colleges, academic departments, centers, institutes, offices, academic, cultural and other programs and administrative and auxiliary units), and (c) forms of endowed named individual recognition (scholarships, fellowships, awards, professorships, chairs, and other individual honors) of the University of Mary Washington for the purpose of commemorating persons, organizations, corporations, or foundations.</p> <p>2) This policy does not apply to the designation or announcement of the availability and cost of facilities, organizations, or forms of individual naming opportunities. Specific listings of naming opportunities shall be available through the Vice President for Advancement and University Relations.</p> <p>3) This policy supersedes the Naming Policy dated September 17, 2009.</p>

	<p>1) <u>Objects of naming:</u></p> <p><i>a) Facilities:</i> all permanent physical structures, major or minor, in whole or in part, including interior and exterior spaces.</p> <p><i>b) Organizations:</i> all permanent units of organization, including colleges, academic and non-academic departments, centers, institutes, offices, academic, cultural and other institutional programs and administrative and auxiliary units.</p> <p><i>c) Forms of named individual recognition:</i> all endowed honors, including scholarships, fellowships, awards, professorships, chairs, scholarship and fellowships programs, and other individual honors.</p> <p>2) <u>Types of facilities and organizations:</u></p> <p><i>a) Major facility:</i> any sizeable or prominent structure or space. Examples include academic buildings; facilities visited by the general public (such as a convocation center, theatre, auditorium, athletic facility and library); prominent entrances (such as gates or atriums); and well-known exterior spaces (such as a street, plaza, park, fountain, or open space).</p> <p><i>b) Minor facility:</i> a generally smaller facility or internal space. Examples include, small structures, classrooms, offices, lounges, laboratories and work spaces</p> <p><i>c) Major organization:</i> any formally established organizational unit that requires consultation and approval by the Board of Visitors. Examples include well-known academic units such as colleges and prominent units such as museums and cultural centers of the University. In case of doubt, an organization should be considered major.</p> <p><i>d) Minor organization:</i> a permanently established organization which is not major. Examples include most departments, centers, institutes, divisions, and administrative and auxiliary units.</p> <p>3) <u>Types of named individual recognition--Endowments:</u></p> <p><i>a) Faculty Endowments--Chair, Professorship and Fellow</i></p> <p>Among the honorific faculty endowments, a named academic chair is the highest level established to support and honor a faculty member's work. Each of the three endowments is established to recognize and support work of the faculty member and may include, but is not limited to, salary or salary augmentation, stipends, administrative support, supplies, travel to scholarly conferences and research or publishing expenses.</p> <p><i>i) Chair:</i> An endowed <u>chair</u> is used to support the teaching, research, and/or</p>
--	---

	<p>academic interests of a distinguished faculty member. The endowment may supplement the position's salary and is considered to be a high honor used to reward the University's best faculty or to recruit professors from other universities or colleges.</p> <p><i>ii) Professorship:</i> An endowed professorship is used to attract and support an exceptional faculty member or notable leader in an academic field. The endowment recognizes the merit of exceptional faculty while providing financial support to supplement the position's salary, and/or use in research, teaching or service activities.</p> <p><i>iii) Fellow:</i> An endowed fellowship is used to support the scholarly study or research of selected faculty members, known as "fellows." The endowment typically provides a stipend or support to faculty members for specific individual pursuits in their fields.</p> <p><i>b) Student Endowments:</i></p> <p><i>i) Scholarships:</i> A financial payment or grant made to support a student's education, awarded on the basis of specific established criteria. Criteria may include financial need, class status, academic major, academic or other achievement, and/or other specific criteria.</p> <p><i>ii) Fellowships:</i> A type of scholarship that provides financial assistance for a student to participate in research or training in a particular field or academic area. Fellowships assist a student to gain experience, strengthen abilities, and develop professional and academic contacts. Students may receive a stipend which may be used for living expenses, travel, research supplies and other expenses.</p> <p><i>iii) Internships:</i> An internship provides a stipend for a student to work in a field they are considering as a career. The student works for an organization under a specific agreement and receives a stipend which may pay for housing, travel, or other expenses related to the internship. The company or organization providing the internship may or not provide financial compensation to the intern.</p> <p><i>iv) Awards:</i> A grant or payment made directly to a student in recognition of status, achievement or other established criteria. Awards are typically provided to graduating students.</p> <p><b>4) <u>Types of Names:</u></b></p> <p><i>a) Commemorative name:</i> The name of an individual person or persons which is assigned as a permanent name for a facility, organization, or other form of recognition</p> <p><i>b) Memorial name:</i> A commemorative name that recognizes a deceased individual(s) who has made extraordinary contributions to the University of Mary Washington, the state, the nation, or the world.</p> <p><i>c) Benefactor name:</i> A commemorative name that recognizes substantial</p>
--	--

	<p>financial contributions by a donor(s) to the University.</p> <p><u>Authority for Naming</u></p> <p>1) Authority for the commemorative naming of organizations, facilities, and other types of individual recognition within the University without benefactor(s) rests with the Board of Visitors upon the recommendation of the President of the University.</p> <p>2) Authority for the naming of permanent facilities, organizations, and types of individual recognition (i.e. endowed scholarships, professorships) involving benefactors rests with the Board of Visitors, upon recommendation by the Vice President for Advancement and University Relations and the President (as appropriate).</p> <p><u>Guidelines for Naming</u></p> <p>1) <i>Commemorative Names</i>: Commemorative naming recognizes those who have made significant contributions in service, support, or honor to the University of Mary Washington. This naming seeks to recognize UMW values and traditions, with a special emphasis on those who have been strong advocates of the pursuit of knowledge and the enhancement of higher education. There are two categories of commemorative names:</p> <p><i>a) Memorial Recognition</i>: Memorial naming recognizes individuals who have made exceptional contributions to the University of Mary Washington, the state of Virginia, the nation, or the world, and whose lives and character are worthy of honor and remembrance. The individual or his or her contribution should typically have a relationship to the facility, organization, or individual recognition being named, and, in this context, does not include a benefactor.</p> <p>To ensure the significance of the honor, the memorial naming of any University facility or major organization shall remain a rare method of honoring individuals. Other university honors should be considered before a memorial naming is proposed.</p> <p>For memorial naming of major facilities and major organizations, a five-year waiting period shall be observed after the death of the individual before considering his or her name for such distinction, unless an exception is specifically approved by the Board of Visitors.</p> <p><i>b) Benefactor Recognition</i>: Benefactor naming recognizes substantial financial contributions by donors to the University in accordance with applicable University policies on the value of gifts. In determining the appropriateness of naming as benefactor recognition, the following factors may be considered, in addition to the personal qualities described above: the net present value of any and all gifts from the donor to be honored, and, in particular, of the gift that motivates the naming; the appropriateness of associating the donor's name with the University; and the donor's other contributions to the University, including volunteer activities, awards, and</p>
--	--

	<p>assistance with other projects.</p> <p>A benefactor may ask the University to name for a person other than himself or herself or his or her immediate family, provided that the proposed individual exhibits the personal qualities described above, the individual's permission is obtained as required by this policy, and the individual is not otherwise disqualified from naming.</p> <p><u>2) Procedures for Naming--General</u></p> <p>a) All naming proposals that require approval by the Board of Visitors must be presented first to the Vice President for Advancement and University Relations who will coordinate with appropriate chief administrator(s). If it is found that the proposal meets the relevant criteria, he or she may refer the proposal to the President for consideration by the Board of Visitors. He or she may also seek additional information from the advocate of the naming.</p> <p>b) The Vice President for Advancement and University Relations or designee thereof will be responsible for assuring that naming proposals have been thoroughly researched and that they meet the stated criteria, making recommendations to the President on naming proposals, and advising on naming policy and procedures, as needed.</p> <p>c) Major facilities and major organizations may not be named for public officials while they continue in office.</p> <p><u>3) Approval for Commemorative Naming of Facilities and Organizations--General</u></p> <p>a) For the commemorative naming of facilities and organizations, all initial approaches to, or serious discussions with, a benefactor or representative of an individual to be honored must have the prior approval of the Vice President for Advancement and University Relations and the President.</p> <p>b) The purpose of preliminary approval is to ensure that the considered naming is consistent with University goals and priorities, with the campus master plan, and with this policy. The approval to proceed allows the approach or discussions to begin and a proposal and terms of agreement to be prepared; approval to proceed does not assure final approval of the proposal.</p> <p>c) Requests for the President's approval to proceed to the Board of Visitors shall contain adequate information to reflect the approvals in paragraph (a) and address the purposes of paragraph (b).</p> <p><u>4) Approval Process for Naming of Facilities and Organizations--Without Benefactor</u></p> <p>a) The Board of Visitors will only accept commemorative and memorial</p>
--	---

	<p>naming proposals for major facilities and organizations from the President of the University or designee thereof.</p> <p>b) A complete proposal for the naming of facilities and organizations without benefactors includes documentation that addresses and verifies criteria in this policy, including:</p> <ul style="list-style-type: none"> <li>○ A full description of the facility or organization to be named</li> <li>○ The name to be adopted</li> <li>○ The basis or reason for the naming</li> <li>○ A description of the due diligence performed on an individual for whom the facility or organization is to be named</li> <li>○ For memorial naming, whether the five-year rule is applicable</li> <li>○ For commemorative names, whether the individual is currently a public official</li> <li>○ Approvals by the relevant department, school, and campus leadership (as appropriate)</li> </ul> <p>After receiving the recommendation, the president may seek additional information or input, disapprove the recommendation or approve the recommendation and, if appropriate, forward the recommendation to the Board of Visitors. The BOV will consider proposals according to its normal operating procedures.</p> <p>5) <u>Approval Process for all Naming--With Benefactor</u></p> <p>a) Proposals for naming facilities, organizations and individual recognition forms funded by benefactors will only be accepted from the Vice President for Advancement and University Relations or designee thereof.</p> <p>b) Proposed benefactor naming of individual recognition forms (endowed scholarships, awards, fellowships, professorships, chairs, programs and other individual honors) shall include:</p> <ul style="list-style-type: none"> <li>○ Formal terms of agreement that include specific criteria, donor information, and management of funds description</li> <li>○ Approval by relevant department or campus leadership (as appropriate)</li> <li>○ Signatures of the appropriate University officials and the benefactor or designee</li> </ul> <p>c) Proposed benefactor naming of facilities and organizations shall include:</p> <ul style="list-style-type: none"> <li>○ Analysis, review and approval by the Vice President for Advancement and University Relations in consultation with and by approval of the President. The analysis should consider the net present value of the gift, other contributions and activities of the donor, consistency with internal gift opportunity amounts, consistency with other policies, and other naming opportunities</li> <li>○ Consent of the relevant department, school, and campus leadership</li> </ul>
--	--

	<p>(as appropriate)</p> <ul style="list-style-type: none"> <li>○ If the naming is for someone other than a donor, formal permission of that person or his or her authorized representative</li> </ul> <p>6) <u>Removal of Names</u></p> <p>a) When a facility or organization ceases to exist, the University will make every effort to continue to commemorate memorial or benefactor recognition in an appropriate way; however, the University will not generally transfer a name to another facility or organization.</p> <p>b) The University reserves the right to withdraw a name under extraordinary circumstances when, based on information unavailable at the time of the naming, the continued use of the name would reflect adversely upon the University and compromise the public trust. In the case of a benefactor naming, the University may remove a name should the financial commitment fail to be satisfied.</p>
<b>PROCEDURES:</b>	
* General Procedures for Implementation:	The University is guided by the terms of this policy in donor discussions regarding the naming of a facility or a program.
* Process for Developing, Approving, and Amending Procedures:	Vice President for Advancement and University Relations brings forward policy revisions as needed.
* Publication and Communication:	Will be published in the Board of Visitors meeting minutes, September 20-21, 2013, and in the policy section of BoardDocs. The policy will be presented to the Leadership Council on October 16, 2013.
* Compliance Monitoring and Reporting:	As individual gift actions are brought to the Board for approval, they will conform with this policy unless the Board of Visitors approves an exception.
<b>RELATED INFORMATION:</b>	
Policy Background:	
* Policy Category:	Advancement and University Relations
Category Cross Reference:	

Related Policies:	
<b>HISTORY:</b>	
* Origination Date:	September 18, 1999
* Approved by:	Board of Visitors
* Approval Date:	September 21, 2013
* Effective Date:	September 21, 2013
* Review Process:	Ongoing review by the Office of Advancement with proposed revisions brought to the Board of Visitors as necessary.
* Next Scheduled Review:	As needed.
Revision History:	<p>February 9, 2002 - Replaced the Donor Recognition Policy for Campus Facilities and University Programs dated September 18, 1999.</p> <p>September 17, 2009 - Replaced the Named Gift Policy dated February 9, 2002. Revision coordinated by Torre Meringolo.</p> <p>September 21, 2013 - Replaced Named Gift Policy dated September 17, 2009. Revision coordinated by Torre Meringolo.</p>