

Philanthropic Naming Policy

Category: External Relations

Approval Authority: Board of Governors

Responsibility: Vice-President, External Relations and Advancement

Date: March 25, 2011

Definitions:

Benefactor: A person or organization that contributes financially to a charitable cause without expectation of direct return.

Denaming: The process of removing a designated name initially conferred as a result of philanthropy upon a physical, academic or programmatic asset.

Endowment: A financial contribution whose capital is invested and preserved in order to create an expendable interest stream.

Naming: The process of conferring an honorific name upon a physical, academic or programmatic asset as a result of philanthropy.

Philanthropy: The effort to increase the well-being of humankind, commonly through charitable contributions and voluntarism.

Purpose/Reason for Policy:

The naming of university activities or property is a long-established custom at Trent University, dating back to its inception. From named Chairs and awards to named buildings and gardens, Trent University welcomes the opportunity to honour those who have rendered outstanding service to the University, the Province of Ontario, to Canada, or internationally.

In particular, Trent University welcomes the opportunity to honour individuals and organizations whose generous philanthropy makes possible the construction or restoration of buildings, the establishment of endowments, the development of innovative programs and, in general, the advancement of the University's mission.

Several factors make it desirable to update and clarify the granting of named philanthropic recognition at Trent University:

- the need to provide a protocol for establishing recognition to those who render outstanding benefaction to the University;
- the need to promote consistency in the tributes paid by the University to its supporters;
- the need to ensure appropriate utilization of the very limited number of naming opportunities;
- the need to provide guidelines for those involved in discussions with donors
- the need for measures to protect the academic integrity and reputation of the university

Scope of this Policy:

This policy guides the granting of named philanthropic recognition at Trent University for:

- buildings or substantial parts of buildings (wings, rooms, laboratories) or other locations on campus such as roadways
- special research, teaching, recreational, service or other facilities
- programs of research, teaching
- departments, schools or professional programs
- programs of service or recreation
- lectureships, special lecture series, awards for excellence in teaching, research, or performance of other academic responsibilities
- fellowships, scholarships, bursaries, prizes and other student awards
- endowed or limited duration chairs, professorships
- library collections of books or other materials
- series of publications produced by a division or department; endowed publication grants for books not designated as part of a series; awards for outstanding publications
- collections of works of art
- trophies and other awards for extracurricular achievement
- such other entities as the University may from time to time see fit to name in order to recognize service or philanthropic donations

While both philanthropic and non-philanthropic naming processes share many common principles, Honorific and Wayfinding Campus Names are covered under a separate policy. Gift Acceptance is also addressed under a separate policy.

Policy Statement:

This policy and its related procedures govern philanthropic naming, renaming and denaming at Trent University.

Principles and Responsibilities:

1. Ultimate authority to accept or decline any proposal to name at Trent University rests with the Board of Governors. In the case of named academic appointments (i.e. Chairs, Professorships), named academic initiatives (e.g. lecture series or major scholarships), or significant named areas of academic life, details of the naming and/or terms of reference will be developed in consultation with academic representatives, and/or the Senate, as appropriate.
2. Ultimate authority to discontinue the designated name of a building, room, area or program (i.e. denaming), or to transfer the name to another building, room, area or program, at Trent University rests with the Board of Governors.
3. Consistent with Trent University's *Gift Acceptance Policy*, the acceptance of any philanthropic donation which involves a proposal to name is conditional upon ultimate approval of the naming by the Board of Governors. Such approval may be provided in principle on the basis of a schedule of defined naming opportunities and the appropriate level of philanthropic donation required for each (see Procedure on Negotiation and Approval of Philanthropic Naming).

4. Notwithstanding any other provision of this policy, no naming will be approved or (once approved) continued that will call into serious question the public respect of the University or would otherwise not be in the best interests of the University, in the opinion of the Board. Preserving the academic integrity and reputation of the university is of fundamental importance.
5. No name will be approved that requires or directly implies the University's endorsement of a partisan political or ideological position or of a particular commercial product or service. This does not preclude the name of an individual who has at one time held public office or the name of an individual or a company that manufactures or distributes commercial products or services.
6. The University may choose to extend recognition through a naming (e.g. a named building) after a donor/donors, provided that the donor will provide a significant part of the cost of funding the facility or activity. Such recognition will generally take effect once the donor has fulfilled an appropriate portion of their commitment (see Procedure).
7. The value of a naming opportunity of a specific space should be determined by its size, location, and the activity taking place within the space. The value of a program, project, unit or centre should be determined by the numbers of users, the importance of the initiative to the University, and public profile of the program. Appropriate comparators will be used as benchmarks to ensure the valuation of the naming opportunities is accurate.
8. Subject to the terms of this Policy generally, and Sections 2 and 4 specifically, when permanent named recognition has been extended for a gift received, it is intended to be honoured in perpetuity. In the event of changed circumstances (e.g. a facility or program no longer exists) the University reserves the right to determine the form which such permanence may take, generally in consultation with the benefactor or their authorized representative(s) where appropriate.
9. From time to time, it may be appropriate to offer named recognition for a limited period (for example, the Fixed Term Professorship program). In this case, subject to the terms of this Policy, Trent intends to honour the name for that period of time. At the end of the naming term, provided that continued or renewed recognition is deemed to be in the best interests of the University, in the opinion of the Board, the donor, or his/her designate, will be given an opportunity to provide additional support according to the new Terms of Reference.
10. Should changed circumstances lead to the denaming or renaming of a designated facility, program or other initiative, and provided that the University has in good faith fulfilled its original commitment to the benefactor, the University will be in no way obligated to return any portion of a charitably receipted gift to the donor.
11. Provisions in this policy that refer to naming for a benefactor also in general apply to naming for a third party at the wish of a benefactor.
12. Only in exceptional circumstances will facilities or activities be named by benefactors in honour of members of faculty or staff while the honouree remains in the full time employment of the University.
13. The External Relations and Advancement portfolio shall be responsible for maintaining and updating an inventory of named facilities and naming opportunities.
14. The Vice-President of External Relations and Advancement, or his or her designate, shall advise on consistent application of current, approved naming policies with respect to recognition of philanthropic donations.

15. The University reserves the right to decide on the physical displays which may accompany named recognition.

Contact Officer:

Director of Philanthropy, Office of External Relations and Advancement

Date for Next Review:

N/A

Related Policies, Procedures & Guidelines

- a) Endowed Chairs and Professorships Program
- b) Fixed Term Professorship Program
- c) Gift Acceptance Policy
- d) Gift in Kind Acceptance - Scientific & Computer Equipment
- e) Gifts of Publicly Traded Stocks & Securities
- f) Policy on Campus Names
- g) Procedure on Negotiation and Approval of Philanthropic Naming, Renaming and Denaming

Policies Superseded by This Policy:

- a) Policy on Campus Names, 1989