

Policy Number/Title:	9.1.1 Naming University Facilities, Units and Positions
Effective Since:	04/09/2021
Last Revision Approved:	04/09/2021
Responsible Office:	University Advancement

1. Scope:

This campus-wide policy applies to all Winthrop-affiliated employees, whether temporary or permanent, paid or unpaid, as well as students, associates, volunteers, and/or anyone conducting electronic business, transactions, or other official activities for, or in association with, the University as well as members of the public while on University property

2. Definitions:

1.1 General Funds: Operating funds. Usually referred to as E budget, excluding salaries and benefits.

1.2 Useful Life: The number of years that an asset will be used for the purpose intended, as determined by IRS depreciation standards.

3. Policy:

3.1 GENERAL

3.1.1 It is the position of Winthrop University to encourage opportunities for significant philanthropy through the naming of major facilities, units, programs and positions.

3.1.2. This policy is not intended to alter existing naming commitments on the Winthrop University campus. However, it does supersede previous policies or guidelines relating to future naming opportunities.

3.1.3. When naming University facilities for corporations, the appropriateness of the corporate name in a public context should be taken into consideration.

3.1.4. Outright gifts and written, enforceable pledges for periods of up to five years may be used to fully or partially fund a naming opportunity. Testamentary planned gifts (including



gifts by will, trust, retirement plan, or life insurance policy proceeds) may be used in combination with an outright pledge to fully or partially fund a naming opportunity. This is permissible as long as it is secured by an irrevocable gift agreement and the present value of the planned gift meets the agreed-upon gift level. Irrevocable planned gifts (including gift annuities and charitable remainder trusts) may be used to fully or partially fund a naming opportunity as long as the net present value of the estimated remainder value of the gift will meet the agreed gift level.

3.2. GIFT NAMING COUNCIL

3.2.1 The Gift Naming Council (GNC) provides the initial review and recommendations for all such naming opportunities being considered. The GNC, through its review process, will determine if the proposed name (its context) would bring distinction and honor to the University and would be consistent with the traditions, integrity, and mission. If it would not, in the opinion of the GNC, the GNC reserves the right to withhold recommendation of the naming opportunity.

3.2.2 The chair of the GNC will be the Vice President for University Advancement. The GNC will include the following personnel, or their designee, in the evaluation of naming opportunities: the Executive Director of the Foundation, the Vice President for Finance and Business Affairs, Provost, Associate Vice President for University Communications and Marketing Associate Vice President for Facilities Management, Associate Vice President for University Advancement, and Executive Director for Alumni Relations. At the discretion of the chair, the following personnel may also be included depending on the proposed facility or program naming being proposed: the Athletics Director, the deans, and the chair of the Board of Trustees or their designee.

3.3. PROCESS FOR NAMING

3.3.1. In situations where facilities, parts of facilities, units, programs, or positions may be funded by gifts, sharing a gift proposal with potential benefactors should not take place without first seeking the approval of the Vice President of University Advancement. The Vice President of University Advancement shall activate the GNC for the initial review and recommendation of the gift proposal and associated naming opportunity.

3.3.2. Under no circumstances should a gift solicitation take place between a representative of the University and a potential donor without first seeking the approval of the Vice President of University Advancement.

3.3.3. After receiving the naming recommendation for facilities, parts of facilities, units, programs, or positions from the GNC, the President makes a recommendation to the Board of Trustees Committee on Institutional Advancement and Development.



3.3.4. Upon approval by the Committee on Institutional Advancement and Development, the Chair of the Committee shall bring a motion to the full Board of Trustees for their consideration and action.

3.3.5. Only naming opportunities approved by the Winthrop Board of Trustees may be implemented by the administration.

3.4. REQUIREMENT FOR NAMING FACILITIES

3.4.1. It is the general policy of the University that facilities, parts of facilities, plazas and other appropriate areas shall be named after donors (or parties donors are seeking to honor) only with the required minimum gift commitment of 50 percent of the cost of the funding needed for new construction or major renovations.

3.4.2. The same gift guidelines above apply to an existing facility not requiring renovations. The required minimum gift commitment of 50 percent of the facility's current value shall be the basis for calculating such naming opportunities.

3.4.3. Typically, 50 percent of the estimated costs of the specific area or market value as recommended by the Office of University Advancement is required for areas within a facility (classrooms, laboratories, reading rooms, offices, etc.) to be named.

3.4.4. In order for Development staff to secure efficient and timely gifts, a list of areas within a facility, will be submitted by the end of each calendar year through the Vice President for University Advancement for presentation to the Board of Trustees during their annual spring retreat.

3.5. REQUIREMENT FOR NAMING DIVISIONS, COLLEGES, SCHOOLS, DEPARTMENTS, CENTERS, INSTITUTES AND PROGRAMS

3.5.1 Generally, the University will only name units for benefactors (or parties benefactors seek to honor) when the minimum gift establishes an endowment, the payout from which generates income for the named unit equivalent to at least 5 percent of the unit's General Funds expense budget at the time the gift is consummated. These requirements should be viewed as minimum guidelines. The current listing for endowment minimums are notated in Guides Section to this policy.

3.6. REQUIREMENT FOR NAMING POSITIONS

3.6.1. Named positions that bear a special title honoring a named person or organization are established with special sources of funding, which may include funding gifted through the Winthrop University Foundation (WUF) in the form of an endowment.



3.6.2. Titles with endowed minimum funding requirements currently include the titles of Dean, Chair, and Professor.

3.6.3. From time to time, the GNC may identify other titles to be included as named positions. Administrators should consult with the Vice President for University Advancement for a current list of covered titles, notated in the Guides Section and other information when considering the establishment of a faculty or staff position with any endowed title.

3.7. ERECTING PLAQUES, MONUMENTS, MAJOR MARKERS and MISCELLANEOUS

SMALLER ITEMS

3.7.1. Commemorative Trees and Other Objects: Memorial or honorific gifts of trees, shrubs or other plantings in most cases cannot be signified by individual plaques or markers. University Advancement will manage these items on a case-by-case basis in conjunction with Facilities Management.

3.7.2. Bricks, benches, and similar items consuming little, if any, square footage may carry donor or honorary names with the approval of University Advancement and Facilities Management.

3.7.3. All external designs and signage of this nature shall be coordinated by University Advancement to be reviewed and approved by University Communications and Marketing to assure compliance with the University's design standards.

3.7.4. Any naming opportunity related to items in this section do not carry an obligation for the University to support the name for any specified period of time.

3.8. SPONSORSHIPS AND OTHER TEMPORARY NAMING IN THE FORM OF ADVERTISING

3.8.1 All sponsorship agreements that may include a naming opportunity shall be covered by the same process set forth in this policy with submissions to the GNC and approval by the Board of Trustees.

3.8.2 Naming in the form of advertising or sponsorships is temporary in nature, with the duration determined by the contractual agreement not to exceed five (5) years.

3.9. NAMING WITHOUT DONATION

3.9.1 Naming a facility to honor individuals should be extraordinary, and made if the individual has had University-wide influence, or the individual has made exceptional contributions to the nation or world. Requests shall be considered on a case-by-case basis



only when supported by extraordinary justification for the naming. A proposal may be made after five years have passed from the time the honoree has died or been separated from their role with the University for which the person is to be honored.

3.9.2 For donors who have provided financial support to the University in general a donor (whether living or deceased) may be honored through a facility name if the donor has; provided long-term, extraordinary financial support greater than other principal donors; and no other major facility currently bears his or her name.

3.10. RENAMING FACILITIES AND UNITS

3.10.1 The naming of a facility is effective for the useful life of a facility so long as it is used for the purpose for which it was used at the time of the gift. At the end of the useful life of the facility and/or the cessation of the use in effect at the time of the gift, Winthrop University may rename the facility.

3.10.2 In matters of corporate names, the University will work with the corporation to ensure that any change to the corporation's name is considered by the University. If a company ceases to exist, the University may rename the facility or position.

3.10.3 In the event of a renaming under these circumstances, appropriate recognition of earlier donors and honorees may be included in, adjacent to the replacement, or redeveloped facility, if appropriate. This policy also applies to spaces named inside or outside of university facilities.

3.11. REVOKING NAMES ON FACILITIES AND UNITS

3.11.1 In certain circumstances, the University Board of Trustees reserves the right to revoke and terminate its obligations regarding a naming for any reason or for no reason at all with no financial responsibility for returning any received contributions to the benefactor. These actions, and the circumstances that prompt them, may apply to an approved naming that has not yet been acted upon or to a conferred naming.

3.11.2 If the benefactor's reputation changes substantially so that the continued use of that name may compromise the public trust, dishonor the University's standards, or otherwise be contrary to the best interests of the University, the naming may be revoked by the Board of Trustees.

3.11.3 If the benefactor fails to maintain payments on a pledge upon which the naming was bestowed, the naming may be revoked.

3.11.4 If a planned gift upon which the naming was bestowed does not result in the value agreed upon, the naming may be revoked.

4. Procedures:

This section was intentionally left blank.

5. Resources:

[1. Minimum Thresholds for Units, Programs Positions](#)

[2. A Donor Bill of Rights](#)

[3. AFP Code of Ethical Standards](#)

[4. Sample Calculations for Naming Facility, Facility Room, Units](#)

6. History of Revisions:

04/09/2021 Policy first established

7. Approvals:

Responsible Officer Signature/Date:

Vice President/Senior Administrator Signature/Date:

President Signature/Date: