



Title: College of the Holy Cross Naming Policy
Policy Administrator: Vice President for Advancement
Effective Date: September 8, 2017
Approved By: College of the Holy Cross Board of Trustees, Institutional Advancement Committee

Purpose:

Naming opportunities exist to recognize the dedication, accomplishment and/or generosity of extraordinary individuals and entities whose support is valuable to the College of the Holy Cross's mission and programs. This policy, established in 2017 as the first approved naming policy adopted by the College, is intended to provide for an orderly practice, minimum standards and guidelines for employees to follow with respect to Naming Opportunities and the terms and conditions, duration and approval of naming.

Definitions:

“Facilities” include buildings and structures, in whole and in part, including, without limitation, interior and exterior spaces (e.g., wings, classrooms, laboratories, studios, auditoriums, other rooms and components), landscapes and features and objects (e.g., fountains, gardens, trees, benches, walkways) and roads.

“Gift-Related Naming” occurs when a donor makes a tax-deductible contribution of a significant level to the College and is recognized by the College with a naming.

“Honorific Naming” is bestowed in recognition of the dedication or meritorious contribution of a person. Unlike Gift-Related Naming, an honorific naming may be made without a gift; provided, however, that honorific naming may also include private financial contributions related to the naming opportunity.

“Naming Opportunities” include Gift-Relating Naming and Honorific Naming with respect to Facilities, real property, collections, programs, institutes, centers, other organizations and units, endowed funds, academic positions and student support.

“Student Support” includes, but is not limited to, scholarships, awards and fellowships.

Policy:

The College of the Holy Cross welcomes the opportunity to honor those who have rendered extraordinary service or support to the College. Through naming, the College may honor individuals or entities whose accomplishments or generosity advance the mission of the College, including, but not limited to, furthering the capacity of the College to meet its teaching and scholarly objectives, to serve its community and enhance the growth and reputation of the College. To ensure the appropriateness of the honor, the College will follow this policy with regard to all Naming Opportunities.

Administration:

The President of the College shall review, and if acceptable, approve all Gift-Related, and Honorific naming occurrences following the recommendation of the Vice President for Advancement. The President may seek additional counsel from the Executive Team or members, and/or the Board of Trustees as is needed. The Vice President for Advancement will oversee all Naming Opportunity activities, including the administration of the naming process and obtaining approvals.

1. *Gift-Related Naming:*

- a. *Minimum Gift Levels.* The Vice President for Advancement (or designee) establishes minimum gift level amounts for Gift-Related Naming Opportunities. The gift levels are intended as minimum amounts necessary to ensure that the facility, unit, function or item to be named by the donor has sufficient funds available to accomplish its mission. Minimum gift levels are based on benchmarking studies and are determined in conjunction with the Vice President of Advancement with input from members of the Executive Team as needed. Minimum Naming gift levels for Facilities will consider the value, visibility, improvements and marketability of the location. *Fundraising, Campaigns and Marketing of Gift-Related Naming Opportunities.* All fundraising, development and marketing efforts related to Gift-Related Naming Opportunities must be coordinated with the Office of Advancement.
- b. *Types of Gifts.* The Vice President for Advancement shall inform College official(s) approving the naming of the manner in which the gift is intended to be made (outright, pledge and/or bequest). The Gift Acceptance Committee has the authority to allow various types of gifts and gift arrangements in consideration of a naming in accordance with the *Gift Acceptance Policy*.
- c. *Naming for Corporations or Entities.* Naming for a corporation or other entity may be considered, however, additional due diligence, including consultation with marketing and communications, and legal, must be performed to avoid any appearance of a conflict of interest or commercial influence.
- d. *Approval of Gift-Related Naming.* Decisions regarding Gift-Related Naming are made in accordance with the approval process set forth in Section 3 and 4 below and any other applicable College policies, including the *Gift Acceptance Policy*. If the donor does not wish to select the name to be applied when the gift is made, the College may accept the gift, with the name to be determined later, subject to the terms of approval outlined in this policy. The College will strive to ensure that the recognition is equitable and consistent based on gift type, amount and designation, and that it adheres to established standards.
- e. *Duration of a Naming.* Gift-Related Naming shall be for the useful life of the Facility, collection, program, institute, center, other organization or unit, position, endowed fund or Student Support being named, unless otherwise agreed to in the gift agreement. The duration of the naming of a Facility or unit ordinarily continues for as long as the Facility or unit is used in the same manner or for the same purpose for which the naming occurred. Prior to demolition, replacement, re-designation of purpose, substantial renovation or similar modification of a named Facility or unit, the President, based on recommendation of the Vice President for Advancement, may deem that the naming period has concluded. The Office of Advancement will make all reasonable efforts to inform the original donor or the donor's designee at the end of the duration of a naming.
- f. *Documentation of Gift-Related Naming.* All Gift-Related Naming must be documented by a written donor agreement in compliance with the procedures of the Office of Advancement

which has been reviewed and executed in accordance with College contracting requirements. The agreement shall include:

- (i) the duration of the naming as described in subsection 1(f) above,
- (ii) the ability to revoke the naming as set forth in Section 5 below, and
- (iii) with respect to a Facility, confirmation that the naming does not confer the right of the donor to determine the use of the Facility.

g. Announcement of Gift-Related Naming. A naming shall not be publicly announced until final approval has been obtained and a donor agreement has been signed. For binding, irrevocable gifts, a name may go into effect before the gift is paid in full, at the discretion of the Vice President for Advancement. For non-binding, revocable gifts, a name will not be activated until the gift is received.

2. *Honorific Naming:*

An honorific naming may be bestowed in recognition of the dedication or meritorious contribution of a person. A person being recognized by an honorific naming must have exhibited values consistent with the mission and vision of the College. The recognition afforded the honoree may also include private financial contributions related to the naming opportunity. At its discretion, the College may choose to name a Facility after a donor even if it is not stipulated in the donor agreement. When an individual is considered for an honorific naming of a building, the proposal shall be reviewed and approved by the President.

3. *Criteria for Selection of Individuals and Entities:*

Naming is one of the highest honors that the College can bestow. This recognition is a lasting and powerful affirmation of the honoree's connection to the College's mission. Proper vetting and consideration must be completed prior to associating a name with the College of the Holy Cross. The College shall consider:

- a. Consistency of the proposed naming with the mission, values, reputation and vision of the College.
- b. Whether the individual(s) or entity (ies) for whom naming is made has an exemplary character, an unqualified reputation for honesty and personal integrity and the highest standards of personal and professional ethics.
- c. Whether the name may imply the College's endorsement of a political or ideological position or the use of a particular commercial product or service or may present a conflict of interest or a conflict with existing naming.
- d. Whether the College has formal permission of the individual or entity for the naming.

4. *Approval of Naming:*

The Vice President for Advancement (or designee) will provide the rationale for the proposed naming, confirm that any gift commitment meets the minimum funding levels for the Gift-Related Naming proposal, and a description of the gift and other relevant information for consideration in order to obtain required approvals related to naming as described below, which may require coordination with Board of Trustees, the Vice President of Finance and Administration and/or the General Counsel.

- a. *Buildings and Other Facilities.* Naming of buildings must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for

Advancement. The criteria for Gift-Related Naming will consider the value, visibility, improvements and marketability of the location and may be based on a minimum donation after taking into consideration the total cost of the project and the availability of other funds.

- b. *Streets*. The naming of all streets located on College property must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for Advancement.
- c. *Facilities*. Naming of other Facilities (such as lecture halls, classrooms, laboratories, studios, auditoriums, other rooms, other building components, grounds, outdoor renovations, gardens, trees, fountains and benches) must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for Advancement.
- d. *Programs, Institutes, Centers and Other Organizations*. Naming of programs, institutes, centers and other entities must be reviewed, and if acceptable, approved by the President upon the recommendation of the Vice President for Advancement regardless of the cash value of the gift.
- e. *Academic Positions and Funds*. Naming of academic positions and funds must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for Advancement, after consulting with the Vice President of Academic Affairs, Dean of the College, or Provost as is appropriate.
- f. *Student Support*. Naming of scholarships and other Student Support must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for Advancement.
- g. *Miscellaneous Naming Opportunities*. Naming opportunities that are not otherwise set forth in this policy must be reviewed, and if acceptable, approved by the President upon recommendation of the Vice President for Advancement.
- h. *Naming for a Corporation or Other Entity*. Any naming for a corporation or other entity must be reviewed, and if acceptable, approved by President upon recommendation of the Vice President of Advancement. Corporate or organization logos may not be incorporated into recognition signage without prior approval of the President.

5. **Revocation of a Naming:**

The President and Executive Team reserve the right to revoke a naming and remove a name if one of the following conditions occurs:

- a. With respect to Gift-Related Naming, the donor does not fulfill the pledge or financial commitment.
- b. With respect to Honorific Naming, the purpose of the naming has changed.
- c. Based upon information unknown to the College at the time of the naming, the College determines that that continued use of the name would compromise the reputation and reflect adversely upon the College or its programs. For example, in the event that a donor no longer displays exemplary character or the donor's reputation for honesty, personal integrity and personal and professional ethics has been compromised, the College may remove a name.
- d. A change in the family or organizational circumstances causes a donor or other affected individual to request a name change or revocation.

- e. In the event of changed circumstances, the College reserves the right, on reasonable grounds, to revise the form of or withdraw recognition.

Revocation decisions shall be made by the President based upon the recommendation of the Vice President for Advancement. The President will determine whether the Board of Trustees should be consulted. The Office of Advancement shall make donors aware of the possibility of revocation

6. *Documentation:*

The Office of Advancement shall maintain documentation related to each naming, including, but not limited to:

- a. Any agreement with respect to Gift-Related Naming;
- b. The exact name to be adopted;
- c. A precise description of the Facility, program, position, unit or component named;
- d. A description of the due diligence performed on the honoree;
- e. Approval by the relevant authority;
- f. Consistency with announced Naming Opportunity minimum amounts;
- g. Any other relevant information.

Exceptions:

Exceptions to this Policy must be reviewed and approved by the President in consultation with the Vice President for Advancement.

Related Information:

Gift Acceptance Policy
College Naming Opportunities Directory