



<b>Name:</b>	<b>Naming Policy</b>
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<b>Approving Authority:</b>	Board of Governors
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<b>Responsible Office:</b>	Office of Advancement & External Affairs
<b>Responsibility:</b>	Vice-President, Advancement & External Affairs
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## 1. Preamble

Saint Mary's University welcomes gifts from individuals, foundations, and organizations to help us achieve our mission and vision. In recognition of these voluntary commitments, the University may grant a naming opportunity.

Saint Mary's University acknowledges that we are in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq People. This territory is covered by the "Treaties of Peace and Friendship" which Mi'kmaq and Wolastoqiyik (Maliseet) peoples first signed with the British Crown in 1725; along with our commitment to the Scarborough Charter on Anti-Black Racism and Black Inclusion in Canadian Higher Education: Principles, Actions and Accountabilities.

## 2. Purpose

This policy sets out the framework for the identification, valuation, approval, and maintenance related to the naming of tangible and intangible university assets, existing or proposed, in recognition or individuals, foundations and organizations.

## 3. Jurisdiction/Scope

3.1 Naming opportunities will be consistent across all areas of the University and administered by the Office of Advancement & External Affairs (Advancement), which has oversight responsibility for all aspects of the application and management of philanthropic and honorific naming opportunities.

3.2 Naming of university assets shall be made in accordance with this policy and in accordance with other related policies, procedures, and guidelines (such as, but not limited to the Gift Acceptance Policy and its procedures).

3.3 This policy is university-wide and applies to all faculty, staff, students, volunteers, and Board of Governors who seek to recognize a contribution with a naming.

3.4 This policy excludes signage or other forms of recognition associated with sponsorship opportunities negotiated with the University.

3.5 This policy and associated implementation guidelines are informed by applicable policies and guidance offered by the Canada Revenue Agency for donor recognition.

#### 4. Definitions

- a. **Donor/Potential Donor:** A person or entity that has given/may wish to give a charitable donation.
- b. **Gift Agreement:** A written agreement between a donor and the University including the terms of accepting a philanthropic donation and the terms of a proposed name in recognition of a philanthropic donation, which could also include Terms of Reference or Memorandum of Understanding.
- c. **Naming:** The bestowing of a Name on a university asset under the provisions of this Policy.
- d. **Academic unit:** An organizational component of a university such as a faculty or School which is responsible for academic programs or group of courses. This does not refer to the building or space in which the unit is housed.
- e. **Gift (Charitable donation):** A voluntary gift of cash or cash equivalent (including gifts in kind, gifts of security, foundation grants, deferred gifts (including estate gifts), but excludes contract research funding) resulting in the issuing of a charitable tax receipt from the University.
- f. **Honorific naming:** the naming of a university entity to honour the distinguished service and/or significant contributions to the University and its mission or society in general by an individual (i.e., volunteer, community member).
- g. **Philanthropic naming:** the naming of a university entity in recognition of a charitable donation from an individual, foundation or organization.
- h. **University Asset:** A tangible or non-tangible resource, activity, program, or property of Saint Mary's University.
- i. **Sponsorship:** A financial transaction to the University whereby the corporate entity receives marketing value for the transaction, or an advantage, which would make it ineligible for a charitable tax receipt.
- j. **Tangible assets (includes but not limited to):**
  - Specific buildings and parts thereof (i.e., wings, floors, classrooms, conference rooms, meeting rooms, lecture halls, laboratories, foyers, etc.) or other physical properties;
  - Collection of books, archives, art and/or cultural materials;
  - Equipment;
  - Common or green spaces, grounds, fields, gardens, and parks including benches and trees;
  - Other natural features or physical improvements.
- k. **Intangible assets (includes but not limited to):**
  - Academic programs and units (faculties, departments, schools, institutes, centres, etc.) and administrative positions;
  - Scholarships, bursaries, and awards;
  - Faculty positions (i.e., chairs, fellowships, professorships, directorships, and other academic position support);
  - Research centres and institutes, and research programs;
  - Events, both academic (lectures, symposia, conferences, etc.) and non- academic (athletic and other extracurricular events, etc.);
  - Other services /facets of the University.

#### 5. Policy

##### 5.1 Philanthropic Namings

Representatives of the University may consider discussing naming opportunities with donors as a means of recognizing charitable donations. The following guidelines will determine the situations

upon which naming considerations will be approved:

- Namings may be approved to recognize expendable gifts, endowed gifts, pledges, and gifts-in-kind;
- Namings proposed in recognition of planned gifts (i.e., bequests) will be submitted for approval when the philanthropic gift is received.
- Irrevocable planned gifts where ownership of the asset has been transferred to the University may be eligible for naming opportunities at the time of the transfer of ownership with special approval of the Vice-President, Advancement & External Affairs required;
- Gifts received that qualify for external matching gift programs may be considered for a naming opportunity equal to the value of the gift plus the matching funds leveraged; and
- Namings may be approved in the name of the donor or a third party at the request of the donor where the third party or a representative has given consent.

Advancement & External Affairs will create, maintain, and coordinate a university-wide inventory of approved naming opportunities and a matrix of naming levels that fall within the authority of the President and Vice-Chancellor.

All philanthropic naming opportunities will follow these principles:

- enhance the reputation of the University and its standing in the community as an academic institution of high standards and values;
- Acknowledging that Canada's university campuses stand on the ancestral and traditional territories of Indigenous peoples, we call for the collective commitment to work towards liberating Black, Indigenous and transnational frameworks, and knowledge, whilst actively working for a sustainable global future.
- conform with the University's commitment to freedom of academic expression, integrity and quality of education and advance the University's mission, without endorsing an ideological position or commercial product and/or service;
- have been reviewed and agreed upon by the Faculty Dean or Staff Leader that will be responsible for the execution of the donation and/or has oversight responsibility for the usage of the named space; and
- have been reviewed and agreed upon by the donor.
- When determining values for named spaces, the case for naming valuation will be developed based on the following principles:
  - the opportunities offered should align with the mission, vision, and values of the University;
  - planning process and value assignment is completed in advance of offering naming opportunities to donors;
  - consideration of the cost and status of the space (i.e., new vs. refurbished) and the fundraising component of the total project cost;
  - consideration of size, utility, location of space, visibility;
  - exposure to various types and sizes of audiences (students, community members, staff/faculty, etc.); and
  - consideration of gift ranges noted in the Appendix.

Upon approval, Advancement & External Affairs will administer the implementation of philanthropic naming opportunities in collaboration with the donor, the Faculty or Department implicated and the Office of Facilities Management.

## 5.2 Honoric Namings

In exceptional circumstances, naming may be approved to honour an individual or organization for distinguished service to the University or society in general.

- Normally, naming in honour of a member of the Saint Mary's University community will not occur while that person is a regular employee or member of a formal University committee (e.g., Board of Governors, Senate).
- Appropriate criteria for an honorific naming include recognition of exceptional service of lasting value to Saint Mary's University, the broader community, or our country.
- Normally, no more than one space may be named honorifically for any one individual.
- Proposed honorific namings require review and recommendation by the Vice-President, Advancement & External Affairs or designate to ensure that opportunities for significant philanthropic contributions are not eliminated through the honorific naming prior to submission for formal approval.

The President and Vice-Chancellor will review honorific naming proposals with the Executive Management Group and present them, with their recommendation, to the Executive Committee of the Board of Governors for final approval.

## **6. Approval of Naming Considerations**

6.1 Final approval of a naming opportunity is within the authority of the President & Vice-Chancellor for gifts up to \$2 million where there are no special considerations. Final approval is within the authority of the Board of Governors for gifts \$2 million and above or gifts with special circumstances that warrant additional review.

6.2 Named academic units, centres, and institutes as well as Academic Chairs, Professorships and other academic positions require the additional approval of the Senate.

6.3 Saint Mary's University reserves the right to withdraw a naming opportunity if it constitutes a significant and continuing impairment to the University's reputation or if the agreed-upon philanthropic contributions are significantly reduced. Withdrawal of a naming opportunity including removal of signage requires approval of the Board of Governors.

6.4 No naming will be approved that implies the University's endorsement of a political or ideological position.

6.5 Academic units will only be named after individuals. The naming of academic units shall not impede the University from altering its academic and research priorities.

6.6 Naming will be independent of all appointment, admission, and curriculum decisions.

6.7 No corporate logos or branding elements will be used for philanthropic recognition purposes on naming recognition signage.

6.8 Decisions to name will include consultation with appropriate individuals and groups within the university community. Concerns from any member of the Saint Mary's community regarding a philanthropic or honorific naming opportunity may be submitted, in writing, through any Vice-President.

6.9 Notwithstanding any other provision of this Policy, no naming will be approved or continued, if it would be prejudicial to the University, its evolving mission or values, or its community.

## **7. Content of Naming Signage**

7.1 Naming signage will comply with the University's brand and signage standards. The size of the signage will vary depending on the named space, but will normally contain the type of naming, the name itself and may have one additional attribute, such as degree information.

## **8. Duration, Installation and Modification of Namings**

8.1 Any proposal for re-naming or to bestow additional names on a university asset shall adhere to the same principles and requirements outlined in this Policy.

8.2 No commitment to a naming shall extend beyond the life or existence of the entity named or alternatively, for the stated limited time.

8.3 Where appropriate, time limitations for naming opportunities may be established with the donor or proponent of the naming proposal and will be outlined in a gift agreement.

8.4 Normally, the approved name is made public through an announcement and the installation of signage will only take effect when a significant portion (minimum of 40%) of the donation has been received by the University. Exceptions will require the written approval of the Vice-President, Advancement & External Affairs. If a pledge is in arrears at the time of installation, consultation with the Vice President, Advancement & External Affairs should occur in advance of the installation.

8.5 Where a physical space has been named, the University will continue to use the name so long as the facility or component remains in use and serves its original function, or until the time that has been agreed upon in the gift agreement. When the use of a facility or component changes substantially prior to the normally anticipated life span of the space because of academic restructuring, renovation, demolition or other reasons, the University may retain the use of the name, name another comparable room or facility, or retire the use of the name, communicating in advance with the donor or donor representative, if possible and appropriate.

8.6 If a commemorative tree or bench becomes unsightly due to disease, vandalism, or acts of nature or if a tree or bench needs to be removed or relocated due to unforeseen construction within 10 years of its donation, it will be replaced at no additional cost to the donor. After 10 years, the tree or bench will not be replaced.

8.7 The original donor or donor representative may request a change in the name if the donor (corporate or individual) has changed its name. The university may request that the donor bear any associated expenses with the change, such as a change to signage. Changes must be submitted through the same approval process as for the original naming.

## **9. Revocation of Naming**

9.1 A naming may be revoked where retention of the name would be prejudicial to the University's reputation and/or found to be in contradiction to the University's mission, vision or values and its community.

9.2 In addition to the right of revocation outlined above, the University shall retain the right to revoke a naming in recognition of the gift if there is a shortfall in the promised payment(s), following reasonable notice to the Donor and an opportunity to address the shortfall. In case of a shortfall that is not addressed within a period of time as determined by the University, the University may revoke the naming and may offer the Donor(s) an alternate naming commensurate with the actual giving level and shall not be required to return any portion of the gift already received.

9.3 Consistent with the Income Tax Act and Canada Revenue Agency guidelines, if a naming in recognition of a philanthropic donation is revoked, the University shall not return any portion of the gift already received.

9.4 The proposed revocation of a naming shall require written confirmation of due diligence on the background and impact of the subject of the naming to the President and Vice-Chancellor and the Board of Governors. The revocation process shall generally parallel the approval process outlined in this Policy.

## **10. Due Diligence**

10.1 The University shall conduct appropriate due diligence to reasonably assure the Board of Governors that any honouree of a naming is of sound reputation and that the proposed naming complies with this Policy. The Office of the President and Vice- Chancellor and/or University Secretary and Legal Services may be requested to assist from time to time.

10.2 The person(s) vested with approval authority regarding a proposed naming pursuant to this Policy, must be satisfied that the obligations of due diligence have been fulfilled.

## **11. Confidentiality**

11.1 Any discussions of a proposed naming, including gift agreements and naming proposals, shall be dealt with in the strictest of confidence by all parties involved in the process until the naming is publicly announced by the University.

## **12. Records**

12.1 Once a final decision on a proposed naming has been made, and the approved Name has been publicly announced, a copy of the naming proposal, gift agreement, record of decision and/or other relevant documents shall be deposited with the Vice- President, Advancement & External Affairs.

## **13. Relevant Legislation**

[Government of Canada Income Tax Act](#)

[Government of Canada Charities Directorate](#)

[Government of Nova Scotia Human Rights](#)

## **14. Related Policies, Procedures & Documents**

- a) [Gift Acceptance Policy \(Policy 11-1002\)](#)
- b) [Prospect Clearance Policy \(Policy 10-1001\)](#)
- c) [Signing Authority Policy \(Policy 12-010\)](#)
- d) [University Funds Investment Policy \(Policy 4-7001\)](#)

## Appendix – Matrix of Categories & Ranges

The following minimum amounts and ranges by category and type of space are intended as guidelines to ensure general consistency by type of naming opportunity. These categories and types of spaces are not intended to cover every naming opportunity and should not be viewed as exhaustive.

Public/Teaching Areas	Minimum Amount/Range
Entire Building	\$5,000,000+
Lecture Theatre	\$250,000 - \$2,000,000
Study Area / Lounge	\$50,000 - \$2,000,000
Teaching Lab (includes e-learning lab)	\$250,000 - \$1,000,000
Suite / Floor	\$250,000 - \$1,000,000
Seminar Room / Classroom	\$100,000 - \$250,000
Conference Room / Boardroom / Meeting Room	\$100,000 – 250,000
Commemorative Bench	\$10,000
Commemorative Tree	\$5,000

Endowment Category	Minimum Amount/Ranges
Chair	\$ 3,000,000 minimum \$5,000,000 preferred If less than \$3 million, it is a ‘top up’ chair to an existing faculty complement position
Professorship	\$1,000,000 - \$3,000,000
Faculty Fellowship	\$500,000
Lecture Series Fund	\$500,000
Graduate Student Fellowship	\$250,000
Endowed Bursary, Scholarship or Award <i>Annually funded (non-endowed) Bursary, Scholarship or Award</i>	\$ 25,000+ \$5,000 over 5 years minimum

Academic Units	Minimum Amount/Range
Faculty	Senate and Board approval required
School	Senate and Board approval required
Academic Department	\$5,000,000
Centre	\$1 - 5,000,000
Institute	\$1 - 5,000,000