



Carleton
UNIVERSITY

Canada's Capital University

Policy Name:	Philanthropic Naming Policy
Originating/Responsible Department:	University Advancement
Approval Authority:	Board of Governors
Date of Original Policy:	January, 2009
Last Updated:	March, 2021
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Contact:	Chief Advancement Officer

Policy

Carleton University welcomes philanthropic contributions to achieve its academic mission and enhance the student experience. In recognition of a benefactor's commitment to Carleton, the University may attach a name to some entity to recognize exceptional generosity.

Purpose

This policy sets out procedures for the approval, establishment, and maintenance of philanthropic naming opportunities in accordance with the Commemorative Naming Policy and circumstances under which the naming may be withdrawn.

Scope

This policy applies to all departments and individuals at Carleton University who seek to recognize a donor's generosity including:

Major Naming Opportunities

- Buildings, parts of buildings, facilities or physical infrastructure of other types;
- Endowed academic positions;
- Common spaces and green spaces;

Other Naming Opportunities

- Collections of books, artifacts, manuscripts, maps, works of art or any other collection;
- Scholarships, bursaries and other student awards;
- Other naming opportunities as may be reasonably thought suitable.

Procedures

Philanthropic naming proposals must be submitted for approval, in writing, to the Chief Advancement Officer.

University Advancement will review all proposals to ensure that the proposed philanthropic naming:

- Enhances the reputation of the University or its standing in the academic community and with particular due diligence with respect to a gift which:
 - does not expose the university to an uncertain and potentially significant liability;
 - does not come from illegal activities;
 - because of its unusual nature, presents questions as to whether it is within the role and scope of the university.
- Conforms with the University's commitment to freedom of academic expression, integrity and quality of education and advances the University's mission, without overtly endorsing an ideological position or commercial product and/or service;
- Recognizes a significant and consistent proportion of the cost of the entity to be named.

University Advancement will then refer academic naming opportunities to the Provost and Vice-President (Academic) and research naming opportunities to the Vice-President (Research and International) and make a joint report to the Senior Management Committee. University Advancement will directly recommend all other major philanthropic naming opportunities directly to the Senior Management Committee.

Concerns from any member of the Carleton community regarding a philanthropic naming opportunity may be submitted, in writing, through any Vice-President to the Chief Advancement Officer.

The Senior Management Committee will approve or deny philanthropic naming proposals up to \$1,000,000 and send proposals over \$1,000,000 for the President to present, with the President's recommendation, to the Executive Committee of the Board of Governors. The Executive Committee of the Board of Governors shall then consider the matter and forward any recommendation it decides upon to the Board of Governors for consideration and action.

Pending such approval, discussions with donors or other stakeholders regarding philanthropic naming opportunities remain provisional.

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

A naming opportunity that will be funded by a future gift (bequest etc.) will not normally be granted until such time as the gift is realized.

Once named, University Advancement will oversee the maintenance of all naming opportunities in collaboration with Facilities Management and Planning for the duration of the naming.

Plaques or signage recognizing donors and all named spaces shall conform to the approved University design and be consistent with the University's branding and signage policies. The Department of University Advancement should be consulted on all named space recognition signage.

Plaques or other signage of named spaces will not normally be affixed until 20%, or the first pledge payment of an expected gift is received unless otherwise directed by the Chief Advancement Officer.

A named space will normally retain the name as indicated in the gift agreement. If a space must be replaced, or substantially altered in its form, nature or use, the University reserves the right to re-name the asset. Recognition of earlier donors will be included in either the revised space or elsewhere on campus where appropriate.

When the naming of a physical space is for a limited period of time, the fixed term of the naming must be approved in writing with the donor.

If at some future time, changed circumstances should make it impractical to continue using the income from this naming opportunity for the designated purpose, and neither the donors nor their immediate family members are able to consent to an amendment, then Carleton University may re-designate the purpose of the endowment income, provided that the named entity shall continue to bear the original name designated by the donor and the amended terms shall adhere as closely as possible to the original intention of the philanthropic gift.

Carleton University additionally reserves the right to withdraw, terminate, or change a naming opportunity, at the University's sole discretion, if it constitutes a significant impairment to the University's reputation or if the agreed-upon philanthropic contributions are significantly reduced.

This Policy shall be incorporated by reference into any gift agreement that refers to naming rights.

Exceptions or variances to this Policy may be made by the express permission of the University President and Vice-Chancellor.

Contacts:

Chief Advancement Officer

Links to Related Policies:

Commemorative Naming Policy