

## CHAPTER SEVEN

### UNIVERSITY ADVANCEMENT

#### 718 NAMING FACILITIES, PROPERTIES, ACADEMIC ENTITIES AND RELATED AREAS

##### 718.1 Policy Objective

This policy provides guidance to administrators, staff, volunteers and donors in support of Cal Poly in arranging for gift or honorific naming opportunities and recognition of major philanthropic commitments. Naming may honor individuals by recognizing exceptional contributions shaping the University, commemorate Cal Poly's history and traditions, honor long-term and significant financial contributions to Cal Poly, or honor financial contributions to support the facility or program named.

##### 718.2 Authority

The University President retains final authority for recommending naming opportunities to the California State University Board of Trustees (CSU Trustees) and for naming of endowments not requiring CSU approval (scholarships, endowed faculty positions, graduate fellowships, etc.). If CSU Trustees approval is required, the Academic Senate's Executive Committee must review the proposal as part of the approval process by the University President. The vice president of University Advancement (VPUA) or designee assists in determining values of campus naming opportunities, prepares naming proposals, and ensures the approval procedures are followed.

##### 718.3 General Guidelines

The following policy guidelines are generally agreed upon and, in the interest of negotiating significant gifts, may be modified for specific situations at the direction of the University President and VPUA.

##### 718.3.1 Each gift that occasions a naming opportunity must be accompanied by a written gift agreement signed by the donor or the donor's designee and appropriate University officials.

##### 718.3.1.1 The naming of any physical facility, campus grounds, or academic program is usually only appropriate when a significant gift is received.

718.3.1.2 Naming commitments are reflections on the ideals and reputation of Cal Poly, the CSU, and the State of California, and should be reviewed carefully for full compliance with applicable laws and ethical principles.

718.3.1.3 Named facilities are so named for the useful life of the facility and do not carry to a future replacement facility. Named endowments are so named in perpetuity. In rare cases a facility can be named for a period of years, the terms of which must be explicitly detailed in a gift agreement.

718.3.1.4 No permanent naming of a facility, program or endowment will be considered without an irrevocable gift or fully paid pledge. At the University President's discretion, a naming may be reserved for a donor contingent on fulfillment of a pledge. If a pledge remains unpaid beyond the agreed upon period, the University President reserves the right to recommend another naming opportunity or other course of action.

#### 718.4 Naming of Buildings and Interior Spaces

##### 718.4.1 New Construction and Renovations

The cost to name a newly built or renovated facility, or a space within the facility, will be based on the projected philanthropic cost to build or renovate, and will be guided by factors such as the size and significance of the facility, use and location.

##### 718.4.2 Existing Buildings that Are Unnamed

The naming of existing and un-renovated facilities is rare; such cases will be treated individually and must be approved by the University President.

##### 718.4.3 Facilities Named to Honor Individuals or Organizations

718.4.3.1 For individuals or organizations that have made extraordinary contributions to Cal Poly or to society, naming of a facility can be proposed if there has been broad influence on Cal Poly, or exceptional contributions to the nation or world. For individuals, two years must have passed from the time the person has been separated from any compensated role with Cal Poly.

718.4.3.2 For donors who have provided exceptional financial support to Cal Poly in general, a donor (living or deceased) may be honored through a facility name if the donor has provided long-term, extraordinary financial support; and no major Cal Poly facility bears his or her name.

- 718.4.3.3 Major Exterior Spaces Outside Facilities (plaza, fields, malls). Major exterior spaces that are accessible to all may receive donor or honorific naming under the same standards and processes provided for facilities as set forth above.
- 718.4.3.4 Small Exterior or Interior Spaces, Bricks, Plaques and Benches. Small exterior spaces (including courtyards) and small interior spaces, bricks, plaques and benches may carry honorific, memorial or donor names as determined by University Advancement in coordination with the Cal Poly Landscape Advisory Committee and Facility Services.
- 718.5 Naming of Endowments
- 718.5.1 Endowed Faculty and Staff Positions. An endowed faculty or staff position may be established with the completion of a Terms of Use statement in addition to a gift agreement, endorsed by the donor and appropriate University officials.
- 718.5.2 Endowed Student Support. A completed Terms of Use statement and gift agreement are required for any new student support fund. The director of Financial Aid retains final authority for specific eligibility criteria for scholarships and other forms of student support.
- 718.5.3 Endowed Programs. Endowments may be created in support of colleges, departments, academic programs, co-curricular programs/activities, classroom and technology enhancements, student research and projects, and faculty and staff professional development. The amount required to name a specific endowment will be determined by University Advancement in consultation with appropriate University officials, and the amount will be based on the scope and cost of the program to be supported. A completed Terms of Use statement and gift agreement will be signed by the provost, as well as appropriate financial and advancement officers.
- 718.6 Dual Naming, or Changing or Eliminating Named Facilities or Programs
- In general, when a gift from an individual is involved, the naming lasts until a facility or program is replaced, substantially renovated or changed, or its purpose is permanently altered to such an extent as to be inconsistent with the original purpose.
- 718.6.1 If a facility or program is removed, or is substantially changed from its previous form, the University President reserves the right to pursue alternate methods of recognizing the donor whose name was on the previous facility or program. Naming of a facility or program does not entitle the donor to continued naming of facilities or programs after a facility has been removed or substantially changed,

or after a program has ceased to exist in its previous form. An exception could be granted if the University determines that a program is substantially the same, but with a revised focus or name. In cases where this determination is made, the University President may choose to retain the donor's name on the program. In all instances, decisions to change a named facility or program lies with the University President or the CSU Trustees, depending on the level of naming involved.

- 718.6.2 If the use of a facility is changed, and the original donation was related to the previous use, the donor (if living) may be given the opportunity to have the name retained on some portion of the same facility or offered an alternative method of recognition. The donor's name will not necessarily transfer to a new facility to be used for the original purpose. If the donor is deceased, the University will make a good faith effort to contact any immediate heirs of the donor to act on the donor's behalf in determining what the donor would have preferred. If a facility use changes but the naming was not related to the previous use, the name will remain on the facility. If the facility is significantly changed from its previous form, the University President may recommend to the CSU Trustees recognition that a proportional percentage of the original facility be applied to the new facility. The exact type of recognition or signage may, however, not be the same as the original, depending on the facility design and layout.
- 718.6.3 A single facility or space may carry two honorific namings, or may be named in honor of two unrelated donors, or may be named under an honorific naming plus recognition of a donor. An existing naming may be converted to a dual naming if the dual naming does not violate a contractual commitment of Cal Poly to any donor, upon consultation and with sensitivity to the party whose name is currently applied to the facility or space, and with sensitivity to the history and traditions of Cal Poly. Dual namings may also be accomplished by assigning a new donor-designated name or an honorific name to either an interior or exterior space situated within a larger interior or exterior space or facility that is already named, or an interior or exterior space or facility encompassing a smaller interior or exterior space that is already named.
- 718.6.4 If at any time new information comes to light so that continued use of a name may compromise the reputation of the University or the public trust, the University may at its discretion seek to revoke a naming. Revoking a naming requires approval by the University President or CSU Trustees, as appropriate.
- 718.7 Limited-time Naming

Naming opportunities offered to a donor for a specified time period (as opposed to a permanent naming opportunity) may be available at the discretion of the University President, based on recommendations from University Advancement. They will be negotiated on a case-by-case basis, based on the benefit to the University.

**References for CAP 718:**

1. Date approved by the President: May 31, 2013
2. Effective Date: May 31, 2013
3. Responsible Department/Office: University Advancement
4. Revision History: May 24, 2004
5. Related University Policies, Procedures, Manuals and/or Documents:
  - a. Policy and Procedure for Naming CSU Facilities and Properties, adopted by the CSU Trustees on July 8, 1999, <http://www.calstate.edu/cpdc/executive/PolNameFac.pdf>.
  - b. Executive Order 713. CSU Policy and Procedure on Naming CSU Colleges, Schools and other Academic Entities, adopted by the CSU Trustees on November 1, 1999, <http://www.calstate.edu/eo/eo-713.pdf>.
  - c. Academic Senate Resolution on the Naming of Buildings AS-10-76-EC.
6. Laws, Regulations and/or Codes of practice referred to herein or related to this policy: None cited.