

DRAFT POLICY and PROCEDURES

Naming Policy

- **Related Documents:** [Naming Procedures](#); [Coordination of Donation Appeals and Gift Acceptance Policy](#); [Sponsorship Policy](#); [Standing Strong Task Force Report and Recommendations](#)
- **Owner:** Vice-President, University Advancement
- **Approver:** President
- **Approval Date:** _____

I. Purpose

This Policy sets out the considerations and processes for naming Assets at the University after individuals and organizations. Namings may be granted by the University for confirmed Gifts or Contributions, or to commemorate or honour a person, event, place, or idea.

A person's life or an organization's work can have a complex and sometimes contradictory scope. Equally complex are the public associations or interpretations of that life or work which can evolve and change over time. A given Naming will consider the alignment between the values associated with the Naming and the core values of the University.

The practice of assigning a name to a University Asset represents an opportunity to recognize community service, the generosity of time and/or financial support that advances the University's mission and vision.

When considering a proposed Naming, it remains crucial that the name proposed aligns with the University's values, and does not, or will not, compromise the integrity and autonomy of the University or the academic freedom of our faculty.

II. Scope and Application

This Policy applies to all Namings. The general, functional naming of Assets by the University in a manner that is not commemorative or as a result of a Gift or Contribution (for example, "Podium Building") is outside the scope of this Policy.

The Policy does not apply to by the placing of plaques or other memorials where such recognition does not involve the Naming of an Asset.

The authority to approve a Naming under this Policy or Procedures does not in and of itself extend to the authority to approve the creation or acquisition of an Asset, or acceptance of a Gift or Contribution, which shall be taken in the manner prescribed by the applicable policy or procedure.

III. Definitions

1. **Assets** means all University owned, leased or controlled physical and intangible property including, but not limited to, equipment, buildings and physical spaces

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(indoors and outdoors), and the University's academic and research units, positions, programs, and awards.

2. **Benefactor** means an individual or organization that provides a Gift to the University.
3. **Benefactor Naming** means a naming of an Asset as a result of a confirmed Gift.
4. **Commemorative Naming** means a naming of an Asset by the University to commemorate or honour an Honouree, event, place, or idea (Examples include Kerr Hall and Nelson Mandela Walk).
5. **Contribution** means financial or in-kind support that is not a Gift. Support may be in the form of a sponsorship, funding agreement, grant, or other arrangement.
6. **Contributor** means an individual or organization that provides a Contribution to the University.
7. **Contributor Naming** means a naming of an Asset as a result of a confirmed Contribution.
8. **Delegated Approver** means the individual authorized to approve a Naming proposal as set out in **Appendix "A"** of the Procedures or as otherwise designated by the President with regard to a specific exceptional circumstance.
9. **Gift** means financial or in-kind support of a charitable nature that is eligible for a charitable donation receipt as defined by the Canada Revenue Agency.
10. **Honouree** means an individual or organization recognized by a Naming at the University whose service and/or achievements reflect the values and/or aspirations of the University.
11. **Naming** means a Benefactor Naming and/or Contributor Naming and/or Commemorative Naming.
12. **Naming Review Committee** or **NRC** means the standing committee of University community members established by the University to consider existing and proposed Namings.
13. **Procedures** means all procedures established to support the operationalization of this Policy.
14. **University** means Toronto Metropolitan University.

IV. Policy

General

1. The University values and protects its integrity and autonomy, and the academic freedom of its faculty members. The University shall not approve or may revoke a

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Naming that compromises these fundamental ideals, or the University's values or reputation.

2. The University shall not approve or may revoke a Naming if it compromises the principles of commemoration as outlined in the Standing Strong Task Force Report and Recommendations, jeopardizes the financial, legal or moral integrity of the University, or adversely impacts the University's standing and reputation in the community. Revocation of an existing Naming makes a strong public statement and, as such, each revocation procedure will be informed by its particular context.
3. Though the University may consider Naming for an individual who has at one time held public office, or for a commercial organization, such Naming is not an endorsement of a particular political party or commercial products or services.
4. The duration of a Naming can be time limited or be "in perpetuity" (up to the duration of useful life of the named Asset). The University has discretion to extend the duration of a Naming.
5. A Naming must not impede the University from altering its academic and research priorities in future, or infringe the ability of the University to set its own priorities and strategy. In the event it becomes impossible, inadvisable or impractical to maintain an Asset that bears a Naming, or if the University is of the opinion that a revised purpose of an Asset is appropriate, the University shall exercise its discretion to honour the spirit and intent of the original Naming.
6. If the University is unable to proceed with the Asset proposed for Naming, the potential Benefactor is entitled to redirect or curtail future pledge payments on the associated Contribution.
7. If an Asset named in perpetuity must be replaced or substantially altered in its form, nature or use, the University reserves the right to rename the Asset. However, recognition of the original Naming shall continue in some form. When an Asset is proposed for renaming pursuant to the above, the University will make reasonable efforts to inform the original Honouree, Benefactor or Contributor in advance. If the Honouree, Benefactor or Contributor is deceased or no longer in existence, reasonable efforts will be made to inform the appropriate representative(s) in advance of the renaming.
8. All plaques or signage identifying a Naming must conform to approved University designs, and be consistent with the University's branding and signage policies.
9. All Namings must be submitted to the Naming Review Committee, and must be approved by the appropriate Delegated Approver in accordance with the process set out in the Procedures.
10. All Assets are centrally owned and managed by the University, and as such, final approval for Namings must be obtained from the appropriate University representative as provided in the Procedures.

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Benefactor Naming and Contributor Naming

11. The acceptance of a Gift or Contribution does not automatically include the opportunity for Naming.
12. To ensure consistency of Naming for like Assets across the University and in relation to peer institutions in the region, the Naming opportunity shall take into consideration the minimum threshold guidelines set out in the Procedures and the recommendations from University Advancement as appropriate.
13. A Benefactor or Contributor may request to terminate or change their Naming, subject to approval through current University policies and procedures, and provided any associated expenses (e.g. signage updates) are borne by the Benefactor or Contributor.
14. In the event of revocation of a Naming, the University is not required to return any portion of the Gift or Contribution already received unless otherwise set out in the Contribution agreement.
15. A Commemorative Naming proposal that has been rejected by the University on the grounds that it does not align with the University's values, or because it is deemed to compromise the integrity or autonomy of the University or the academic freedom of our faculty, is not eligible for consideration as a Benefactor Naming opportunity or Contributor Naming opportunity.

Commemorative Naming

16. The University may wish to approve a Commemorative Naming to honour an individual whose extraordinary service and contributions reflect the values of the University.
17. In the case of a proposed Commemorative Naming for someone who is or has been employed by the University, the honoree must have left the University at least two years prior to submission of the recommendation.
18. Commemorative Naming proposals may only be submitted by a faculty or staff member or student of the University. Proposals must be submitted in accordance with the process set out in the Procedures.
19. A Benefactor Naming proposal or Contributor Naming proposal that has been rejected by the University on the grounds that it does not align with the University's values, or because it is deemed to compromise the integrity or autonomy of the University or the academic freedom of our faculty, is not eligible for consideration as a Commemorative Naming opportunity.

V. Roles and Responsibility

1. The Naming Review Committee is responsible for:

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- determining any required consultation process for Commemorative Naming proposals
 - reviewing, considering, providing feedback or making recommendations to decision makers for existing and proposed Namings as detailed in the Procedures.
2. University Advancement is responsible for leading any required consultation process for philanthropic Benefactor Naming proposals.
 3. For Contributor Naming proposals that are initiated by other units (e.g. Office of the Vice-President, Research and Innovation), that unit is responsible for leading any required consultation process for the proposal.

VI. Jurisdiction

This Policy falls under the jurisdiction of University Advancement.

The Vice-President, University Advancement is responsible for the interpretation and application of this Policy, and the creation and promulgation of such procedures and guidelines as necessary or desirable to give effect to this Policy.

----- *[Draft Procedures on next page]* -----

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- **Related Documents:** [Naming Policy](#); [Coordination of Donation Appeals and Gift Acceptance Policy](#); [Sponsorship Policy](#)
- **Owner:** Vice-President, University Advancement
- **Approval Date:** _____

I. Purpose

These procedures (the “Procedures”) set out the process for the proposal, review, approval and revocation of Benefactor Namings and Commemorative Namings, and assist in the interpretation and operationalization of the Naming Policy (the “Policy”).

II. Definitions

All capitalized terms not otherwise defined in these Procedures have the meanings set out in the Policy.

1. **Delegated Approver** means the individual authorized to approve a Naming proposal as set out in **Appendix “A”** or as otherwise designated by the President with regard to a specific exceptional circumstance.
2. **Initiating Unit** means the unit or division that identifies and is responsible for coordinating the approval of a Contributor Naming opportunity.

III. Benefactor and Contributor Naming Proposal Submission and Consideration

1. The Benefactor and Contributor Naming Approval Process Flowchart sets out the process by which the University shall approve Benefactor Naming proposals and Contributor Naming proposals.
2. University Advancement (“**UA**”) may propose Benefactor Naming opportunities to a potential Benefactor in the course of fundraising discussions. If the proposal is deemed to raise sufficient interest, then UA shall bring forward the proposal to the NRC for information and the NRC may provide feedback on the naming proposal.
3. An Initiating Unit may propose Contributor Naming opportunities to a potential Contributor in the course of funding discussions. If the proposal is deemed to raise sufficient interest, then the Initiating Unit shall bring forward the proposal to the NRC for information and the NRC may provide feedback on the naming proposal.
4. UA or Initiating Unit shall consider feedback received from the NRC and shall incorporate the feedback into the reputation analysis and supporting documentation provided to the Delegated Approver as appropriate.
5. The Delegated Approver shall consider the proposal, supporting documentation and other relevant information and make a decision. The Delegated Approver communicates the decision to UA or Initiating Unit, and NRC.

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6. A Benefactor Naming that will be funded by a future Gift (e.g. bequest) will not be considered for approval until the Gift is realized.
7. The Minimum Naming Valuation Guidelines (set out in **Appendix “B”**) are established by UA to set baseline thresholds to name an Asset, in accordance with the Policy. University Advancement may establish a named trust cost centre at any dollar value for any duration.

IV. Approved Benefactor and Contributor Namings

1. The Delegated Approver is responsible for effecting the approved Benefactor Naming or Contributor Naming and associated signage including working with University Relations on a design and bearing all associated costs not otherwise borne by the Benefactor or Contributor.
2. Fabrication of physical signage for a Benefactor or Contributor Naming should only be undertaken upon receipt of at least 20% of total funds committed for the Gift or Contribution.

V. Commemorative Naming Proposal Submission and Consideration

1. The Commemorative Naming Approval Process Flowchart sets out the process by which the University shall approve Commemorative Naming proposals.
2. Commemorative Naming proposals must be submitted by faculty, staff or students of the University through the online Naming Request Portal for consideration by the NRC. In considering each proposal, the NRC shall review the proposal and supporting documentation, and shall engage additional parties as appropriate.
3. The NRC shall meet at least two (2) times per year to consider Commemorative Naming proposals.
4. The NRC shall communicate their recommendation on a Commemorative Naming proposal to the Delegated Approver, who shall review the recommendation and consult with the NRC as appropriate, and consider the proposal, supporting documentation and other relevant information and make a decision.

VI. Approved Commemorative Namings

1. The Delegated Approver is responsible for effecting the approved Commemorative Naming and associated signage including working with University Relations on a design and bearing all associated costs.

VII. Naming Revocation

1. The University may revoke a Naming as set out in the Naming Policy.

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2. The University may revoke a Benefactor Naming or Contribution Naming if there is a shortfall in the anticipated Gift or Contribution payment(s) or, in the University's opinion, unlikely prospect of completing the original commitment of the Gift or payment of the Contribution. Following consultation with the Benefactor or Contributor to discuss opportunity to cure, the University: (i) may revoke the naming and offer an alternate naming opportunity commensurate with the actual giving level; and (ii) shall not be required to return any portion of the Gift or Contribution already received unless otherwise stated in the Contribution agreement.
3. Naming revocation requests may be submitted by faculty, staff or students of the University to the NRC. The NRC shall be responsible for establishing the appropriate procedure for each request as required and engaging additional parties as appropriate.

VIII. Roles and Responsibility

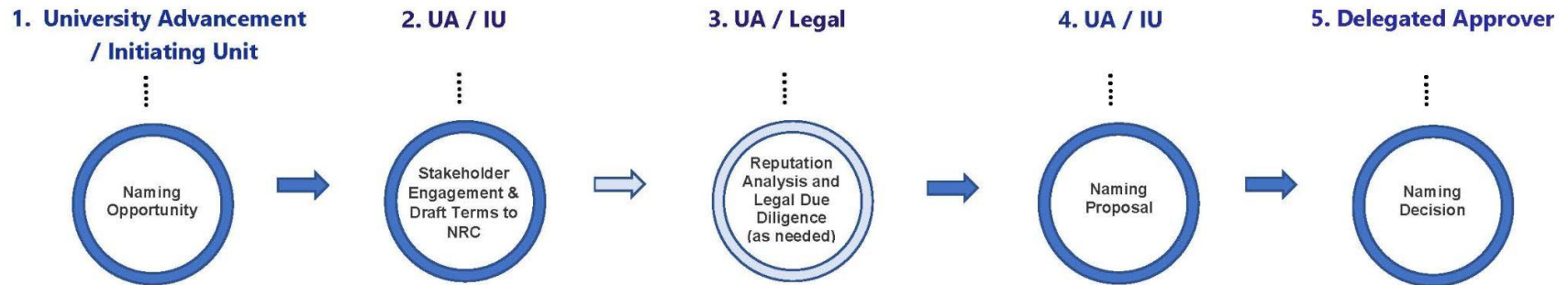
1. For Benefactor and Contributor Namings:
 - a. At the proposal stage, University Advancement is responsible for leading any required University consultation process for the approval of Benefactor Naming proposals.
 - b. At the proposal stage, Initiating Unit is responsible for leading any required University consultation process for the approval of Contributor Naming proposals.
 - c. The NRC may provide feedback to University Advancement or Initiating Unit on proposed Benefactor or Contributor Namings.
 - d. Once approved, University Advancement or Initiating Unit is responsible for leading the review and approval process for the design of approved signage in coordination with University Relations, and communicating the Naming decision to Executive Group ahead of any public announcement as appropriate.
2. For Commemorative Namings:
 - a. At the proposal stage, the NRC is responsible for determining any required University consultation process for the approval of Commemorative Naming proposals.
 - b. Once approved, University Relations is responsible for leading the review and approval process for the design of approved signage.
3. The NRC is responsible for receiving Naming revocation requests and overseeing the process for each request.
4. Facilities Management and Development is responsible for fabrication of approved Naming signage in coordination with University Relations, as well as the installation and maintenance of signage.

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5. The Delegated Approver is responsible for communicating the Naming decision to Executive Group ahead of any public announcement.

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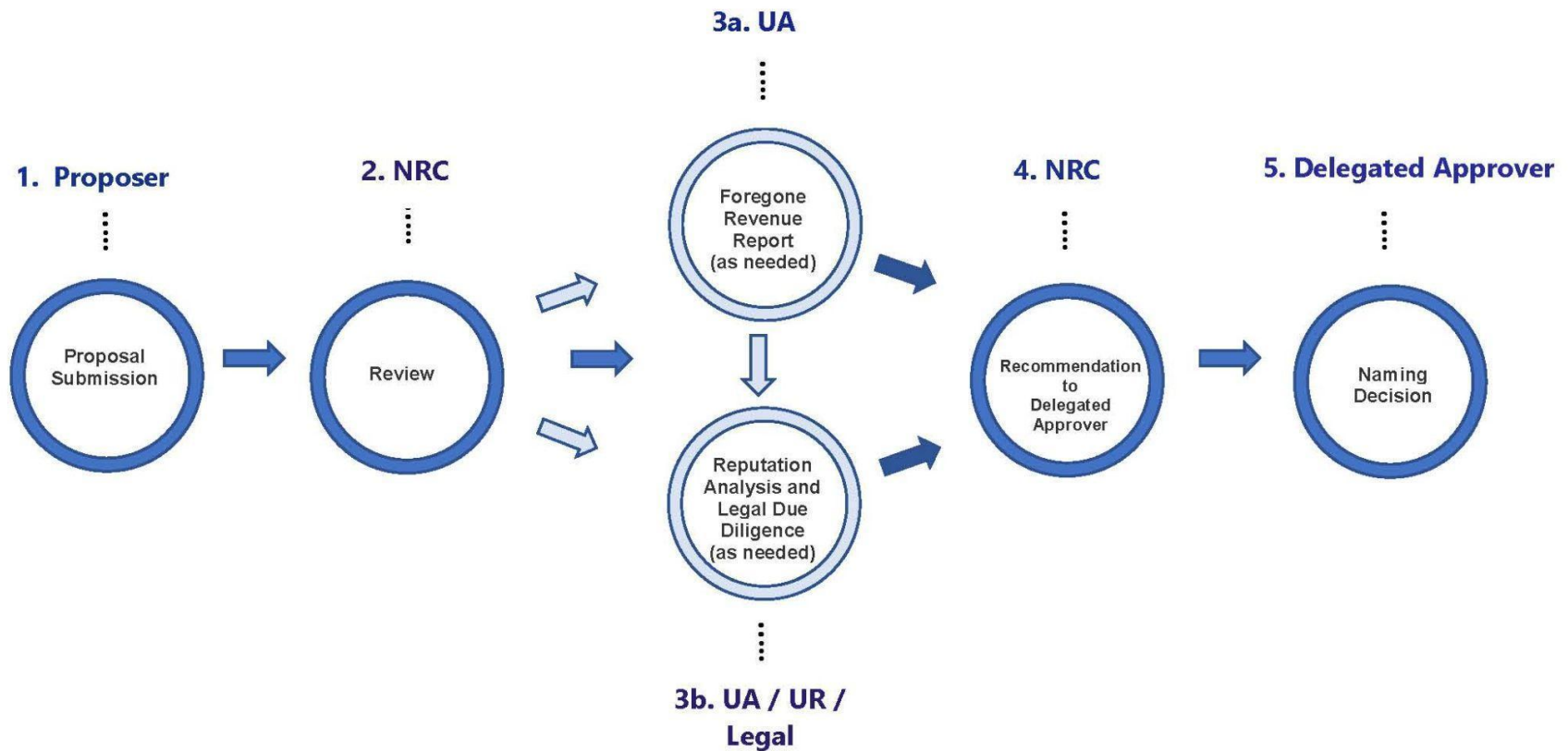
Benefactor and Contributor Naming Approval Process Flowchart



1. Funding discussions raise the possibility of a Benefactor Naming or Contributor Naming opportunity.
2. University Advancement (UA) or Initiating Unit (in consultation with NRC if needed) uses Naming Category Guideline to determine appropriate parties to engage for consultation, as Delegated Approver, and for information; sends naming proposal and draft terms to NRC for information and feedback.
3. If UA or Initiating Unit deems the Name or Asset category warrants further review, then UA shall complete a detailed Reputation Analysis and request a Legal Due Diligence assessment on the Benefactor from the Office of the General Counsel.
4. UA or Initiating Unit reviews NRC feedback and provides updated terms, Reputation Analysis and Legal Due Diligence (as needed), and supporting documentation to the Delegated Approver as appropriate.
5. Delegated Approver communicates approval or rejection to UA or Initiating Unit and NRC. NRC communicates the decision to EG.

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Commemorative Naming Approval Process Flowchart



1. Proposal is submitted for the commemorative naming through online Naming Request Portal.
2. NRC reviews the proposal. If a specific Asset is proposed for naming, NRC uses the Naming Category Guideline to engage appropriate parties for consultation, as Delegated Approver, and for information.
3. Upon request by the NRC, UA / UR / Office of the General Counsel will provide a Foregone Revenue Report (Step 3a) for the specific Asset that is proposed for naming and/or a Reputation Analysis and Legal Due Diligence assessment of the Honouree (Step 3b), if the Name or Asset category warrants one.
4. NRC reviews the proposal and other submitted documentation, engages additional parties as appropriate, and provides recommendation to the Delegated Approver. (NRC's recommendation **not** to name is considered binding).
5. The Delegated Approver considers the submitted proposal, and makes the final decision back to the NRC and the Proposer.

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Appendix A: Naming Category Guidelines

ASSET TYPE	For Consultation	Delegated Approver	For Information
Divisional Subject- and Program-Related Assets Labs; Lecture Series; Meeting Rooms; Non-Degree Programs; Offices; Study Rooms; Zones Graduate Student Awards; Post-Doctoral Fellowship	UA, NRC, UR, or Legal (as required) YSGS	Divisional / Decanal lead	EG, FMD EG
High Profile Central Assets and High Profile Academic Assets Faculties; Departments; Schools; Library Research Centres / Institutes; SRC-focussed Research Chairs Buildings; Gardens; Green Roofs; Parks; Plazas; Public Spaces; Thoroughfares Administrative Positions (e.g. Dean, Chief Librarian)	UA, NRC, UR, or Legal (as required) and Divisional/Decanal lead or President and OVPRI or Senate (as needed)	President or Provost	EG; FMD; UR EG EG; FMD EG
Other Central Assets and Multi-Use Spaces Athletic Facilities; Atria; Classrooms; Galleries; Info Commons, Lecture Halls; Library Spaces; Student Learning Centre (SLC) Study Spaces; Study Commons; Theatres	UA, NRC, UR, or Legal (as required) and primary space user	Provost	EG; FMD
Undergraduate Student Awards Awards; Bursaries; Scholarships	UA	Registrar; Divisional / Decanal lead	
Assets \$10,000,000 or more (for Benefactor and Contributor Namings) Gifts or Contributions of \$10,000,000 or more	President*	Board of Governors	EG

* Asset Namings at this level tend to be unique, and appropriate consultation will be undertaken in each case.

Glossary:

EG	Executive Group
FMD	Facilities Management and Development
NRC	Naming Review Committee
OVPRI	Office of the Vice-President, Research and Innovation
UA	University Advancement
UR	University Relations
YSGS	Yeates School of Graduate Studies

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Appendix B: Minimum Valuation Guidelines

Capital Projects - Physical Spaces				
\$10M+	Building <small>(Higher of: 50% of fundraising goal or 33% of TPC (\$10M minimum))</small>			
\$5M+	Wing / Floor			
\$3M+	Building Atrium	Info Commons	Learning Facility	Outdoor Plaza
\$1M+	Entrance / Hall / Gallery (RIC)	Co-Lab	MAC Alumni Lounge	Outdoor Gate
\$500K+	Large Classroom / Lecture Theatre <small>(ca 100 max capacity)</small>	MAC Hockey Team Room	MAC Concourse	
\$250K+	Medium Classroom <small>(ca 50 max capacity)</small>	Multimedia / Digital Lab	Equipment Intensive Lab	Garden / Courtyard / Urban Farm
\$100K+	Small Classroom <small>(below 50 capacity)</small>	Meeting Room	Athletic Team Rooms	Small Roof Terrace / Green Roof
\$50K+	Small seminar room	Lounges		
\$25K+	Small office			

Academic Units / Programming				
\$20M+	Faculty / Division / Main Library			
\$10M+	Department / School			
\$5M+	Institute / Centre	Zone		
\$3M+	Athletic Program			
\$2M+	Athletic Team (10 Yr Term)			

Positions / People				
\$5M+	Endowed Dean / Chief Librarian / ED Athletics / Director RIC			
\$3M+	Endowed Chair / Librarian / Athletic Coach / Endowed Director (e.g. Institute)			
\$1M+	Limited Term Chair (over 5 yrs)	Endowed Post Doctoral Fellowship		
\$300K+	Endowed Graduate Award - requires capital to provide min \$10k/yr			
\$100K+	Expendable Post Doctoral Fellowship (over 2 yrs)			
\$60K+	Endowed Undergraduate Award - requires capital to provide min \$2k/yr			
\$50K+	Expendable Graduate Award (\$10k/yr over 5 yrs)			
\$10K+	Expendable Undergraduate Award (\$2k/yr over 5 yrs)			

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Considerations when determining naming valuations for spaces:

SIZE	Total square footage, NASMs (net assignable square metres)? Footprint of the building; are there multiples of this space or is it the only one? What kind of foot traffic or number of users are there in the space each day / week / year?
CONDITION	Is the space new / refurbished? Innovative in any way?
GEOGRAPHY	Is this a 'marquee' location within the university footprint or within the space? Is it on Yonge Street or other prominent location? What is it adjacent to? What is the foot traffic or daily visual id asset?
PROMINENCE	Is this Asset one that has a high profile across campus or is well-known? Is the use of the space considered high profile, e.g. the lab of a renowned researcher, or home to cutting edge technology?
MARKETPLACE	What is the profile of this space in the World? What is the naming valuation of this kind of space / asset relative to others like it at other institutions with which Toronto Metropolitan University is compared today and hopes to compare / compete tomorrow? (Consider what other schools have done and contextualize the conversation that way).

Considerations when determining naming valuations for student awards:

IMPACT	Will this award meaningfully change the student's learning experience (e.g. allow them to quit or reduce part-time work to take advantage of unpaid research or international experience opportunities, etc)?
ADMINISTRATION	Are the terms of this award flexible enough that it can be given out consistently? Does the amount of the award justify the administrative overhead required to review applications, select candidates, administer funds, report to the donor etc?
MARKETPLACE	How does the amount of this award compare with those given out by other universities in our region / peer group? Do we want to lead / follow / equal what other institutions are offering?

----- *[END of Draft Policy and Procedures]* -----