

DONOR RELATIONS, NAMING AND RECOGNITION POLICY

PURPOSE The purpose of this Policy is to serve as a set of guiding principles regarding the stewardship of current and future donations to the University. This policy is intended to ensure donors' intentions are honoured, gifts are properly acknowledged in a consistent manner and to clarify the process under which University assets are named.

SCOPE This Policy applies to all donations to Brock University.

This Policy applies to all Brock University faculty, staff, and employees and volunteers soliciting, receiving, or managing Donations to Brock University.

POLICY STATEMENT The University will ensure proper acknowledgement and recognition of all Donations to the University, including through Donor Recognition and stewardship activities and events and fund reporting. The University may also recognize individuals or organizations who have made outstanding contributions to the mission of the University or are of special significance to the University through honorific naming of tangible or non-tangible University assets.

Gift Acknowledgement

Donations received by Advancement and External Relations will be recorded in the Development and Alumni Database and acknowledged in compliance with the appropriate laws and according to industry best practices. The University is committed to maintaining the confidentiality of donor information as per the Access to Information and Protection of Privacy Policy.

Considerations for Honorific Naming and recognition

The University may choose to recognize individuals or organizations with the naming of tangible or non-tangible assets in their honour where:

- (1) The actions of an individual or organization who is recognized with an honorific naming will reflect the vision and mission of the University through outstanding achievements in learning, discovery and citizenship, through exceptional scholarly distinction, remarkable service or leadership of lasting value to the University community, or highest historical significance to the University.

Recommendations from the community for honorific naming are coordinated through Advancement and External Relations. Recommendations are considered by the President of the University and the University Community Experience Committee, and are presented for final decision by the Board of Trustees.

Only in exceptional circumstances will Honorific naming be approved for current University faculty or staff, Board of Trustee members, or Senate members.

- (2) Brock University may also wish to recognize the generosity and commitment of our donors who support the mission of the University with a philanthropic gift. Recognition is given on the basis of a single payment gift, a contribution pledged over time, or a documented planned gift to the University, including gifts of private benevolence. Normally, Donor Recognition is provided upon the completion of a Gift Agreement and upon receipt of a minimum of 50% of the pledge commitment.

Procedure to Name Assets in Recognition

Advancement and External Relations in collaboration with Facilities Management is responsible for maintaining an inventory of named University Assets as described in this policy's procedures.

The naming of physical space and academic entities in recognition is a well-established practice at Brock University. Naming provides meaningful opportunities for the recognition of outstanding contributions by those who serve as inspiration

for future generations of students, graduates and members of the University community.

The University can name buildings or other assets for a variety of reasons.

The University can name buildings or other assets in recognition of philanthropic support and gifts.

The University can name buildings or other assets for those who have made significant contributions to the life of the University or the local, national or international communities.

Responsibility for approving naming in recognition rests with the Board of Trustees.

Namings of an academic nature may require additional approval from the Senate. Naming of academic units shall not impede the University from altering its academic and research priorities nor infringe on academic freedom and shall conform to all University policies and guidelines. Naming will be consistent with the mission and values of the University.

Donor Recognition for planned gifts (insurance, bequests) is based on the present value of the gift received in the future. Normally, the recognition and naming will be honored after the gift has been received. Only in exceptional circumstances will Honorific naming for planned gifts will be considered for approval by the Board before the funds have been received.

Duration of namings

Unless otherwise negotiated, the duration of the naming will normally be the useful life of the tangible or non-tangible asset. If an asset must be replaced or substantially altered in its form, nature or use, the University may retain the use of the name, name a comparable asset or rename the asset. The party for which the asset has been named will be advised of impending change.

Exceptions

Naming will not be approved where, in the judgment of the Board of Trustees, identification with the recognized donor would constitute a significant and continuing challenge to the reputation of the University.

De-Naming

An asset will be de-named only by the authority of the Board of Trustees under the following circumstances:

Where events or information available subsequent to the approval of the designation means that identification with the designation constitutes a significant and continuing challenge to the reputation of the University, or;

Where a donor has failed to meet the total pledge commitment over the agreed pledge period and where there is no satisfactory commitment to revised pledge terms. In this case, the donor's gift will be removed from the University's public donor list. Alternately, University might name an alternate space in its discretion in recognition of the received funds.

Stewardship Activities and Events

In addition to gift acknowledgements, the University may recognize donors through a special event or announcement and on-going donor and stewardship opportunities to strengthen the link between the donor and the institution to build trust, credibility and gratitude through acknowledgement, recognition and accountability.

Gift Reporting

Gifts to the University shall be reported in a manner consistent with the standards recommended by Council for the Advancement and Support of Education (CASE).

Fund Reporting

Brock University will provide donors of endowed funds an annual financial report of their fund. In the case of student awards, information about the award recipient will also be shared.

DEFINITIONS

Fund reporting - fiduciary responsibility of the University to report annually on the financial status of endowed funds.

Donor Recognition - action(s) taken by the University to acknowledge the generosity of the donor.

Donation - voluntary transfer of money or property by a donor to the University by way of benefaction where no material benefit is received by the donor from the University in return.

Donor - any person or organization making a donation to the University.

Pledge - a documented commitment to make a donation within a specific period of time.

Tangible assets *- buildings and parts thereof (e.g., lecture or seminar rooms, laboratories, foyers, lounge areas), equipment, open spaces (e.g., roads, gardens, fields) or other natural spaces or physical improvements.

Non-tangible assets *- academic units (e.g., faculties, departments, schools, institutes, programs, centres, libraries), endowed chairs, lectureships / fellowships / professorships / scholarships or bursaries, events both academic (e.g., lectures, conferences, symposiums) or non-academic (e.g., athletic or extra-curricular events), student services or other services.

* These are examples of University assets but do not comprise a comprehensive list.

COMPLIANCE AND REPORTING

The interpretation and application of this Policy is the responsibility of Office of Development & Alumni Relations. Final decisions related to this Policy will be made by the Board of Trustees, where required.

Any policy violations should be brought to the attention of the Executive Director, Development & Alumni Relations.

Policy Owner:	Associate Vice-President, Advancement and External Relations
Authorized by:	Board of Trustees
Accepted by:	Senior Administrative Council
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