



## St Hilda's College Naming Policy

1. This policy is intended to cover all facilities and activities for which the College might wish to consider naming opportunities including; the naming of buildings, spaces within buildings, gardens as well as academic posts, scholarships, bursaries, prizes, and sponsorship for lectures, workshops or seminars.

2. The policy covers recognition of philanthropic and financial contributions as well as other significant non-financial contribution(s) to the College. It will be provided to donors and prospects and will underpin all gift agreements.

3. Governing Body is responsible for reviewing all naming proposals and will make final decisions on these.

3.1 The College reserves the right to terminate the naming by a donor at any time, if for any reason it considers the association with the name to be damaging to its reputation or if the donor is in breach of the gift agreement, for example through non-payment of agreed contributions. (See 9. Terms of Naming).

3.2 In the case where the College accepts a gift at or above £100,000 as part of a matching donation programme with the University, the donor's name will be submitted to the University's Committee for the Review of Donations and Research Funding (CRDRF) in line with existing practice for gifts over £100,000 in these circumstances. A recommendation shall be made by the CRDRF to the College and any potential ethical issues identified. This reflects current practice and the guidelines in the Principles and Protocols of Fundraising for matched funding.

3.3 In addition to the requirement for matching donations (3.2), the College may elect to submit the name of any donor for a gift at or above the £100,000 threshold, to the CRDRF and invite the CRDRF to provide advice and recommendations against its guidelines on the acceptance of the gift.

4. In the case of a gift to name a post, scholarship, exhibition, bursary or prize in a subject, approval would also be sought from the Fellows for the subject.

5. The Development Director will coordinate the list of gifts and donors for naming and bring these to Governing Body for approval on a termly basis following the meeting of the Development Advisory Committee. The briefing will include some biographical background about each proposed naming for spaces/buildings.

Governing Body will only consider naming opportunities for tutorial fellows in the following circumstances (1) posthumously and (2) where the individual has made a specified contribution to College life and raised College's profile.

Once approval has been granted, the Development Office will follow up with the donor and prepare the gift documentation and record this to ensure the College and the donor have copies of the agreement.

The required gift level will be set in accordance with the Guidelines on Naming Opportunities (see 7). The gift levels may be varied by the College at its discretion.

### 5.1 Gift agreements

- for naming gifts at or over £10,000, once approval has been given, a written gift agreement must be signed and a copy lodged on the donor's record. A copy will be provided to Accounts at year-end for auditing purposes.

- for naming gifts between £5,000 - £9,999, once approval has been given, a gift agreement may be set up, in the same way as for gifts at or above £10,000 if requested by the donor. Otherwise, a gift acknowledgement, signed by the Principal, will be sent to the donor in the normal way.

- for naming gifts below the £5,000 threshold, once all steps are completed, a gift acknowledgement, signed by the Principal, will be sent to the donor in the normal way.

## 6. Duration

Naming opportunities and the period of recognition will be in the gift of the College and will be entirely at its discretion (as stated in 3). Naming of buildings and major public spaces and rooms will be for the useful life of the building unless agreed otherwise. Naming of scholarships and bursaries will be maintained for the life of the funding that has been set up for that purpose.

## 7. Guidelines for Naming

### 7.1 Criteria

The overriding criterion will be that the Governing Body of the College wishes to recognise an exceptional contribution made to the College. In instances where the primary contribution is financial, gift thresholds will be advised at the time for different categories of naming.

Where this is a non-pecuniary contribution, for example recognising the exceptional contribution made to the College by an individual over an extended period of years, one decision should not be seen as a precedent for 'automatic' recognition of individuals who make a contribution over a similar period of years at a later date. Each decision should be taken on its merits and made solely on a case-by-case basis.

### 7.2 Qualifying philanthropic gifts

Gifts may be in cash, in kind, or in the form of a pledge agreed in writing (formal gift agreement). The philanthropic gift does not have to be directly used for the particular entity being named. For example, a donor may give a sum or several sums over a period of time for various purposes and be honoured by the naming of a room or other item, providing that the total sum given is at or above the gift threshold for that item.

### 7.3 Thresholds for naming opportunities:

#### 7.3.1. Buildings and Facilities

Buildings: naming opportunities will be set by the College and will normally be 51% (or higher) of the construction cost of a new building or the replacement cost of an existing building. This may be varied by the College at its discretion.

The naming may be offered for the whole building or adjusted for the naming of part of the whole building, such as a floor or a significant public area within the building. More than one opportunity may be present in one project, for example, the whole building may be named as well as significant public rooms and other smaller rooms within the building.

Facilities: naming opportunities for facilities will be set by the College and will normally be 30-40% of the refurbishment and/or equipment cost.

Facilities include teaching rooms within a building and external areas such as courtyards or roof gardens within the College.

### 7.3.2. Academic Posts

Endowed posts: naming costs for posts will be quoted to the donor in line with the College's standard calculation for annual return on the capital invested (an average annualised return of 3.5% has generally been applied) to support the cost to the College of the nominated post at that time. For example, in 2020 the following threshold amounts would apply:

To endow a College University Fellowship (CUF) post:  
£3m (whole cost of the post)  
£2m College share of the post

To endow the College share of a University Lecturer (UL) post:  
£1.2m

Fixed-term posts: naming of posts will be quoted to the donor in line with the College's standard calculation to cover the costs for the agreed period.

### 7.3.3. Scholarships, Bursaries and Prizes

Undergraduate awards: minimum for naming an undergraduate scholarship or bursary, a contribution of £1,250 or more annually for 3 years, for a prize, £250 or more to be given annually.

Graduate awards: a minimum of £8,000 annually for a minimum of 2-3 years for a contribution to a graduate scholarship which may be matched with University funding sources to create a fully-funded award (UK/ROI student: £25,000; EU/International student: £35,000 pa for a fully-funded award including living costs).

These amounts will be increased annually in line with the stated costs and fees advertised by the University for UK/ROI and EU/ international students.

Where matching funds are provided from other University sources eg Clarendon, the naming of the award will reflect the existing protocols.

7.3.4. Other activities – for example, naming of an existing College lecture series, subject dinners, events for sports teams and societies

A minimum of 50% of the cost of the activity.

## 8. Gift agreements

Formal gift agreements will be used (as described in 5.1) to confirm the naming, once approval has been given by Governing Body.

Legacy pledges may be received by the College for naming purposes, but recognition of the pledge through naming should not occur before the gift is received. The College may, at its discretion, vary this where other factors apply, such as other lifetime contributions to the College by the donor. Governing Body approval must be sought in such cases.

## 9. Terms for Naming

For buildings, significant public spaces and rooms, the naming will apply for the useful life of the building.

For gifts to name posts or student awards, specified periods of time for naming will be determined, since it is very difficult to name these 'in perpetuity'. Where possible, the College will undertake to agree any variation in the use of such funds with the donor or their first generation heirs.

### 9.1 Termination of Naming and option to extend the naming

In the case of recognition linked to a gift for a specified period of time, or to a spend-down fund, the period of recognition will end on the date specified in the gift agreement or when the funds have been expended.

The donor or their heirs may wish to enter into a further gift agreement with the College and to continue their naming option beyond the initial termination date. If no such agreement is entered into within 90 days of the end of the existing gift agreement, the College will remove reference to the name of the donor.

### 9.2 Termination of Naming due to reputation issues

In all gift agreements, the College reserves the right to terminate the naming by a donor at any time if for any reason it considers the association with the name to be damaging to its reputation or if the donor is in breach of the gift agreement, for example through non-payment of agreed contributions.

In the case of early termination, the College shall write to the donor outlining its intention and giving the donor 30 days to respond.

Termination of naming shall be managed by the Development Director in conjunction with the Bursar and Principal.

The College may seek the opinion of the University's Committee for the Review of Donations and Research Funding to guide its decision.

## **Appendix – Procedure for Naming and Gift Agreements**

1. Naming opportunities to be offered by the College will be agreed with Governing Body and may be offered via specific campaigns or fundraising appeals and promoted in brochures, presentations and meetings to potential donors. The College's naming policy and procedures will be advised to donors and prospects.

2.
  - a) The Development Director or other representative will collate expressions of interest from donors for the naming opportunities. Their names along with biographical information for the donor and the name they may wish to give to the room, student award etc, will be reviewed and where the donor (or name) is not sufficiently known to the College, the Committee for the Review of Donations and Research Funding may be invited to provide advice to the College.
  - b) When ready, the list of those who have expressed interest in naming opportunities will be taken to the Development Advisory Committee (DAC) as part of regular reporting then submitted via DAC papers to Governing Body for formal approval. Donors' names and details, as well as the biographical details for those for whom they may wish to name to space or award etc, will be treated in confidence and in compliance with GDPR.
  - c) The naming opportunities will be submitted to Governing Body for confirmation.
3. Following the submission of names to Governing Body, the outcome will be communicated to the donor/prospect. If accepted, a gift agreement or letter of acknowledgement, depending on the gift threshold, will be drawn up (as stated in 5.1) and sent to the donor/s with the College's gift policy. The Gift Agreement will specify the purpose for the gift and the naming option, the amount, the pledge date/s if the donor wishes to make instalments over a period of time, and any other relevant information about the gift.
4. The Gift Agreement will be signed by the donor and the College, and a copy will be lodged on the donor's record and sent to Accounts. The naming of the room/space etc will be advised to the buildings staff, and any plaque that may be applied will be recorded and replaced during maintenance activities.
5. The donor will receive regular reports in relation to the gift, and a stewardship programme appropriate to the level of the gift will be drawn up.