



DONOR RECOGNITION & NAMING POLICY

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1.0 PURPOSE

The purpose of this policy is to define the process that governs the recognition of donors to George Brown College, including protocols for determining permanent recognition through the naming of College activities, programs, awards, spaces, or other assets. The policy formalizes donor recognition in order to provide:

- appropriate public recognition and consistent institutional appreciation of major donors;
- public evidence of philanthropic activity that demonstrates that the College enjoys considerable external support and encourages others to invest in the College's future;
- appropriate utilization of the limited number of naming opportunities;
- clear guidelines for those involved in discussions with donors;
- facilitation of increased and ongoing support from existing supporters.

The naming of a building, space, activity, or program reflects the importance of the donor to the realization of the College's mission and vision. The donors name can add prestige to the building, to the program, to the faculty, or to the program in return.

References to the Executive Committee will be replaced by George Brown College Foundation Board of Directors, in the absence of the Executive Committee.

2.0 PRINCIPLES

2.1 NAMING OPPORTUNITIES

Decisions to name facilities, programs, and awards shall be compatible, to the extent reasonably ascertainable, with George Brown College's mission and vision. Decisions to naming recognition shall be in alignment with the strategic directions of the College.

In cases where philanthropic contributions include a specific naming opportunity, the recognition will follow the generally accepted College standards regarding size, placement, etc. These gifts will be distinguished from non-philanthropic partnership agreements which may have a branding or co-branding component. Naming recognition in these cases is determined by the terms of the gift agreement.

The approval of a naming opportunity will not result in additional costs for the College, excluding the College's approval process, without prior approval.

2.2 LIMITATIONS TO NAMING OPPORTUNITIES

No naming opportunity shall be approved if it:

- is likely to have a negative impact on the image or reputation of George Brown College;
- would call into serious question the public respect for the College or the Foundation and/or implies endorsement of a partisan political or ideological position. This does not preclude use of the name of an individual who has previously held public office and/or could imply

endorsement of a specific commercial product. This does not preclude using the name of an individual or company that manufactures or distributes commercial products;

- honorary naming or distinguished naming may be considered and approved on a case by case basis by the College and Foundation Presidents. Facilities or activities will not be named to honour the outstanding service of a member of faculty or staff while the honouree remains in the full-time employment of the College.

3.0 SCOPE DEFINITIONS

For the purposes of this policy:

Gift refers to an outright donation to the College in cash or in-kind from an individual, corporation, foundation, or other source, for either restricted or unrestricted use by the College. Gifts are made without expectation of tangible return or benefit to the donor.

Endowed gifts are donations made to the College on the understanding that the principal amount of the donation will be invested for a minimum ten-year period, with the interest earnings to be used to advance specific education purposes of the College, such as the establishment of a scholarship, or the funding of a particular program or activity.

Expendable Gifts are gifts or grants given to the GBC Foundation/College that the donor has directed to be used immediately in support of various programs or projects.

George Brown College Foundation welcomes and receives gifts from generous individuals, corporations, foundations and associations. The Donor Recognition and Naming Policy guides the extent of donor recognition and naming procedures at George Brown College for:

- buildings or substantial parts of buildings (wings, classrooms, laboratories, libraries) or other locations on campuses such as lobbies and common areas;
- special research, teaching, recreational, service, or other facilities;
- endowed programs of research and teaching;
- endowed programs of service or recreation;
- Chairs, special lecture series;
- scholarships, bursaries, prizes and other student awards and funds;
- library collections of books or other materials;
- cultural property (i.e., collections of art);
- contributions of curriculum-related equipment;
- green space, sitting areas, bicycle and walking paths and streets;
- such other entities as the College may from time to time see fit to name in order to recognize gift contributions.

4.0 DEVELOPMENT OF NAMING OPPORTUNITIES

4.1 GENERAL

The College and the Foundation shall mutually agree on a comprehensive list of naming opportunities during a campaign or otherwise.

All naming opportunities shall be approved by the President of the Foundation responsible to fundraise for a specific program, awards, spaces, or other assets, facility, in consultation with the College as required.

Acceptance of new naming opportunities with a value of \$1,000,000 or greater shall also be brought before the College President for approval.

Naming opportunities for new or existing facilities/programs/functional areas/services shall be assigned a monetary value, as established by the Foundation in consultation with the College.

The naming opportunity values for new or existing facilities/programs/functional areas/services shall take into consideration the function, usage, size, marketability and financial requirements (replacement and/or operational costs) of the opportunity.

Every 3 years, or more frequently if required, the Foundation shall re-evaluate the naming opportunity evaluation to ensure listed value reflects the market value of the naming opportunity.

4.2 ROLES AND RESPONSIBILITIES

Role	Responsibility
Foundation President	<ul style="list-style-type: none">• Consider proposals for all new naming opportunities• Consider and approve proposals for new naming opportunities up to \$999,999.99
College President	<ul style="list-style-type: none">• Consider and approve proposals for new naming opportunities of \$1,000,000 or greater value and, at the request of the Foundation President, provide consultation on new naming opportunities of \$999,999.99 and lesser value

4.3 PROCEDURE

The following is the process undertaken by the Foundation in consultation with the College when determining the value for new naming opportunities:

- evaluate the space, considering the square footage, purpose and use of the space, cost to build and equip, location of the space, public profile and prestige of the opportunity;
- determine an appropriate value for the new opportunity;
- the Foundation President will consider and approve proposals for all new naming opportunities;

- the College President will consider and approve proposals for new naming opportunities of \$1,000,000 or greater and, at the request of the President, provide consultation on new naming opportunities of \$999,999.99 and lesser value;
- a master list of naming opportunities will be maintained by the Foundation.

5.0 ASSIGNMENT OF NAMING OPPORTUNITIES

5.1 GENERAL

Naming opportunities may be assigned for a living person, in memory of a person or after a family, foundation, association, service club, business or corporation.

The naming for a benefactor may also apply for a third party at the wish of the benefactor and must be agreed upon by the honouree if living.

Naming associated with a particular facility or endowment shall not preclude further naming within the same facility/program/functional area/service.

Recommendations for assignment of naming opportunities for the College originate with the Foundation, in consultation with the College President, where appropriate.

All naming decisions shall be supported by appropriate and complete documents including written documentation stipulating rationale and conditions underlying the naming and filed with the Foundation.

When it is proposed that a facility or room within a building be relocated within the same building, or to a different building, provided that the new facility or room will serve the same original purpose, no recommendation or approval under this policy is required to relocate the name. Foundation shall notify Donor of relocation.

The College is responsible for maintenance and associated costs of all asset classes and for notifying the Foundation of changes to facility or room usage. The Foundation is responsible for notifying applicable donors of any changes to named locations.

5.2 ROLES AND RESPONSIBILITIES

Role	Responsibility
Foundation Executive Committee	<ul style="list-style-type: none">• Review and approve non-standard requests (standard is 20%) for minimum amount of a total pledge commitment that must be received prior to recognizing the Donor's gift
Foundation President	<ul style="list-style-type: none">• Consider and respond to all requests for naming based on this policy• Act as the primary liaison between the Donor and the College for naming recommendations/requests
College President	<ul style="list-style-type: none">• Consider and approve naming proposals that involve naming or re-naming of buildings, external facilities, programs and/or any structure that has an exterior name based on this policy

5.3 PROCEDURE

The Foundation will discuss various options of recognition with donors. Recognition may be in the form of naming opportunities and/or public recognition.

The following is the process undertaken by the Foundation and Donor when determining a naming opportunity to recognize gift(s) to the Foundation:

- determine the value of the naming opportunity;
- determine the proposed terms of the gift agreement, if applicable;
- determine the proposed rights and benefits;
- draft and sign the gift agreement or pledge form;
- receive at minimum 20% of the total pledge commitment or as agreed upon by the Foundation Executive Committee & Donor;
- confirmation of selected naming opportunity and/or recognition benefits;
- draft and sign a donor recognition signage form which includes a signage proposal and acknowledgement/recognition plan.

Documentation with respect to the naming decision, stipulating rationale and conditions underlying the naming decision and all other supporting documentation shall be maintained by the Foundation.

6.0 DONOR RECOGNITION INSTALLATION (DONOR WALL)

6.1 GENERAL

A permanent donor recognition installation listing all those who have contributed one-time gifts to the College of \$10,000 or more will be established in an appropriate, central location. This may take the form of a donor wall or another format suitable to the site of installation. The Foundation will make recommendations concerning this installation and consult with appropriate bodies, including the Marketing/Communications Department. Updates to the physical location (donor wall) will take place annually. Signage standards apply to all physical and non-physical assets.

The Foundation will honour a donor's request to remain anonymous in tributes, printed materials, permanent signage, and all other forms of public recognition. GBC staff and faculty donors will not be identified by name in any internally or externally circulated reports without their permission.

Donor pledge commitments will only be recognized on the physical location (donor wall) after:

- receipt of a signed gift agreement or pledge form;
- receive at minimum 20% of total pledge commitment or as agreed upon by the Foundation Executive Committee & Donor.

6.2 Roles and Responsibilities

Role	Responsibility
Foundation Executive Committee	<ul style="list-style-type: none">• Review and approve non-standard requests (standard is 20%) for minimum amount of a total pledge commitment that must be received prior to recognizing the Donor's gift
Foundation Board of Directors	<ul style="list-style-type: none">• Responsible for approving the development of a donor wall or another suitable format and budget plans
Foundation President	<ul style="list-style-type: none">• Responsible for developing and approving the development plans with the College• Responsible for developing permanent recognition budget plan
College President	<ul style="list-style-type: none">• Responsible for approving permanent recognition site development plans with the Foundation

7.0 NAMING OPPORTUNITY TERM AND DOCUMENTATION

7.1 GENERAL/FIXED TIME PERIOD

Existing names and/or commitments shall be honoured as of the approval date of this policy, unless revoked or removed.

All assets named subsequent to the implementation of this policy shall be named for a maximum period of 10 years from the date of recognition signage installation/unveiling except for the name recognition for physical assets such as buildings. The naming of buildings shall be named as long as the College operates on the same land. Any additional assets named in perpetuity are on an exception basis and must be approved by the College President.

In the case of a naming that is part of an agreement to provide non-philanthropic support, the naming will be for the period provided in the agreement. In the case of an endowment, the naming will continue for the life of the endowment.

Periodically the College and Foundation may provide the honorary naming of an asset in recognition of a person/group/organizations' contribution to the College. At the approval of the College and Foundation Presidents, the naming term for the honorary naming of an asset shall be for as long as the College operates on the same land.

All agreements with donors for named recognition shall be recorded in writing, through a signed pledge form or gift agreement. For gifts equal or greater than \$1,000,000 a signed gift agreement is required.

A signed donor recognition signage form shall be completed for all naming opportunities, which is completed after receipt of the 20% of the total pledge commitment, cash gift or as agreed upon by the Foundation Executive Committee and Donor. The College and/or Foundation shall honour naming in accordance with the gift agreement and donor recognition signage form which is made with the donor.

Name longevity is available for a specific term and is to be stated in the gift agreement and donor recognition signage form. Once the term has expired, the existing donor shall be provided with the opportunity to make another gift through First Right of Refusal as outlined in this policy.

The Foundation reserves the right to revoke a naming right as a result of the following circumstances:

- if it is determined that the actions or deeds of the individual or corporation that the asset is named for are not in keeping with the mission or standards of the College or the Foundation;
- failure of a named or honoured donor/person to fulfill agreed upon obligations.

7.2 NAMING AND ACADEMIC POSITION OR PROGRAM

The naming of an academic position or program will normally require a donation sufficient to offset 15% of the annual operating budget of that position or program. The President of the Foundation will refer academic naming opportunities to the President of the College and Vice-President, Academic to jointly recommend the naming to the Senior Management Committee. The Senior Management Committee will identify appropriate major philanthropic naming proposals for the President to present, with his or her recommendation, to the Foundation Board of Directors.

7.3 ENDOWMENTS

Endowed gifts are donations made to the Foundation on the understanding that the principal amount of the donation will be invested for a minimum 10-year period, with the interest earnings to be used to advance specific education purposes of the college, such as the establishment of a scholarship, or the funding of a particular program or activity.

Donors of \$20,000 or more to create endowed support for student scholarships will have the opportunity for naming according to an agreement established between the donor and the GBC Foundation. Matching gifts obtained as a result of the endowed contribution will be not included in the cumulative total, for all public recognition purposes.

7.4 MULTI-YEAR AWARDS

An expendable contribution to provide a multi-year student award (to a maximum of 5 years) that provides a total donation of \$5,000 or more will have a naming opportunity as per agreement between the donor and the GBC Foundation.

7.5 ONE-TIME AWARDS

Expendable gifts are donations or grants given to the Foundation/College that the donor has directed to be used immediately. An expendable gift in the amount of \$1,000 or more may be used to create a named one-time student award as per agreement between the donor and the Foundation.

7.6 NAMING FOR DISTINGUISHED SERVICE

The President's Office in conjunction with the Foundation will consider, on a case by case basis, naming in recognition of distinguished service Individuals or groups contemplating a naming opportunity to recognize such service must consult directly with the College President and Foundation. Facilities or activities will not be named to honour the outstanding service of a member of faculty or staff while the honouree remains in the full time employment of the College.

7.7 LIMITATIONS ON NAMING

Facilities or activities¹ supported through private gifts may be named after a donor/donors provided that the donor funds all or a major part of the cost of the facility or activity. "Major" is deemed to mean either a significant part of the actual project costs, or a contribution that is regarded as central to the completion of the facility or activity, and represents a substantial part of its value.

7.8 NAMING SUBJECT TO RAISING FULL COST

When the gift contribution does not meet the full cost of the project, the naming is subject to completion of satisfactory funding arrangements and the naming will take place only after that is achieved. If the College is unable to proceed with the project, the potential benefactor(s) will be invited to redirect their contribution(s) and/or to curtail future pledge payments.

7.9 ROLES AND RESPONSIBILITIES

Role	Responsibility
Foundation Executive Committee	<ul style="list-style-type: none"> Review and approve non-standard requests (standard is 20%) for minimum amount of a total pledge commitment that must be received prior to recognizing the Donor’s gift
Foundation President	<ul style="list-style-type: none"> Negotiate, approve and sign gift agreements in compliance with this policy Protect the confidentiality of gift agreements to the extent practicably possible Seek advice from the Foundation’s legal counsel regarding the proposed gift agreement as required Provide information to donors/applicants on the interpretation of this policy Ensure the Foundation receives the necessary documentation and information from the Donor Ensure the Donor fulfills their gift commitment as outlined in their pledge form or gift agreement and as outlined in this Policy
College President	<ul style="list-style-type: none"> Review and approve gift agreements to ensure that the College’s interests are adequately protected as required

8.0 RECOGNITION OF NAMING OPPORTUNITIES

8.1 GENERAL

Content of naming signage is the responsibility of the Foundation with the consent of the donor. The Foundation President may consult with the College President as appropriate.

In recognizing donors, the GBC Foundation will be guided by the *GIFT ACCEPTANCE POLICY* and the *DONOR RECOGNITION AND NAMING POLICY*.

Donor naming signage may only be procured for a named physical asset after:

- approval has been granted by the appropriate governing body;
- a signed gift agreement or pledge form and donor recognition signage form;
- receipt of 20% of total pledge commitment or as agreed upon by the Foundation Executive Committee & Donor.

Signage shall be in compliance with the College and Foundation visual identity standards.

Donor logos shall not be used on assets, except the College external facility signage, unless otherwise approved by the Foundation, in consultation with the College. Donor taglines or marketing terms shall not be included in donor recognition names, unless otherwise approved by the Foundation, in consultation with the College. All external signs for campus naming shall display the building name along with the College logo.

If a corporation or business name changes, signage and other naming devices may be changed at the cost to the donor with the approval of the original approving authority.

Publicity surrounding the naming of an asset shall be coordinated by the Foundation.

Announcements regarding the naming or to publicize a donation shall only be done after:

- receipt of a signed gift agreement or pledge form;
- receipt of 20% of the total pledge commitment or at the discretion of the Foundation Executive Committee;
- approval of the proposed naming by the appropriate governing bodies, if applicable;
- and in agreement with the donor.

The Foundation, in consultation with the College, is responsible for developing the recognition signage standards for all donation levels. Exceptions to the recognition signage standards are approved by the Foundation President, in consultation with the College President as appropriate.

Initial signage and installation costs are at the Foundation’s expense. If or when there is a change in company ownership and/or donor recognition name, the signage may be adjusted to the new name. Revised signage and installation costs are at the Donor’s expense, provided it meets the approval of the College and Foundation.

8.2 ROLES AND RESPONSIBILITIES

Role	Responsibility
Foundation Executive Committee	<ul style="list-style-type: none"> • Review and approve non-standard requests (standard is 20%) for minimum amount of a total pledge commitment that must be received prior to recognizing the Donor’s gift
Foundation President	<ul style="list-style-type: none"> • Consult on recognition signage for donations as required • Approve proposals for recognition signage that are outside of the recognition signage standards, consulting with the College President as appropriate
College President	<ul style="list-style-type: none"> • Consider proposals for recognition signage as brought forward by the Foundation President

9.0 RENAMING, ADDING, REMOVING OR REVOKING NAMES

9.1 GENERAL

If a name is deemed to no longer be in the best interest of the College or the donor, it is possible to have a name changed, removed or revoked. The donor must be informed and the name change must be approved by the appropriate governing body, in consultation with legal counsel.

A request to rename, add, remove or revoke a name from a facility/program/functional area/activity/awards shall conform to the following principles:

When the function of an asset is changed due to the asset being sold, demolished, substantially renovated, rebuilt or designated for another use, the College may continue to use the name, transfer the name to another comparable asset, or discontinue the use of the name. (It may be appropriate to place a plaque in, or on, a new space to indicate that it occupies the site of a building formerly known by another name.) If the donor's naming term is not complete (naming term is 10 years for all assets, except naming of the college or college campus and applicable honorary naming opportunities), the Foundation shall provide the donor with an alternative naming opportunity of comparable value for the balance of the naming term.

A name shall be revoked and removed from an asset if it is determined that the actions or deeds of the individual or corporation it is named for are not in keeping with the mission, vision or standards of the College and/or Foundation or failure of a named or honoured donor/person to fulfill agreed upon obligations.

A naming right (for any class of assets) may be revoked at any time by the original approving authority upon a request, investigation, recommendation and decision:

- the Foundation President and College President shall consider and recommend revocation of naming rights, and consult with the Senior Management Committee and/or College Board of Governors as deemed appropriate;
- the Foundation Board of Directors and College President shall approve revocation of naming rights;
- Foundation may obtain legal counsel to advise on how to proceed, where appropriate.

When a named facility has reached the end of its useful life and will be replaced or substantially renovated, the replaced or renovated facility may be renamed in recognition of a new donor or honouree. If the donor's naming term is not complete (naming terms is 10 years for all assets, except naming of the college or campus and applicable honorary naming opportunities), the Foundation shall provide the donor with an alternative naming opportunity of comparable value for the balance of the naming term. Appropriate recognition of earlier donors or honourees shall be included in the new, renovated or redeveloped facilities at the discretion of the Foundation President.

9.2 ROLES AND RESPONSIBILITIES

Role	Responsibility
Foundation Executive Committee	<ul style="list-style-type: none"> • In conjunction with the College President, consider and recommend revocation of naming rights, and consult with the College Senior Management Committee and/or College Board of Governors as deemed appropriate; bring forward recommendation of revocation to the Foundation Board of Directors
Foundation Board of Directors	<ul style="list-style-type: none"> • In conjunction with the College President, consider and approve proposals for revocation of naming rights, as brought forward by the Foundation Executive Committee and College President • Record decisions of revocation • Consider appeals of established naming rights as required
College Executive Committee	<ul style="list-style-type: none"> • Consult on proposals for revocation of naming rights, as deemed appropriate
College Board of Governors	<ul style="list-style-type: none"> • Consult on proposals for revocation of naming rights, as deemed appropriate

9.3 PROCEDURE

Submit recommendation for revocation of naming right to approving authority, as outlined in section 9.2.

Any recommendation for revocation put forward must provide the following information:

- description of the naming right involved;
- documentation pertaining to the original approval and subsequent name;
- the value of the naming right;
- the name of the donor;
- reasons for recommending the revocation of the naming right;
- names of the original approval authority that do not support revocation of the Naming right, the reasons for dissent, and the financial impact, if any.

The approval authority shall review the recommendation and make a decision. Decisions shall be recorded at Foundation Board of Directors meeting.

All public communication surrounding the revocation of a naming right involving buildings shall be handled by the College Marketing/Communications Department and the Foundation.

9.3.1 PROCEDURE FOR UNFULFILLED PLEDGE PAYMENTS

The Foundation shall communicate with Donors who have not fulfilled their gift commitment in a timely manner:

Years of Unfulfilled Pledge Payments	Action
1 year	Foundation staff engage in period of consultation with the Donor to re-establish the pledge payment schedule. Foundation President shall notify Foundation Finance Committee Chair of gift status.
2 years	Foundation staff shall continue to engage in period of consultation with the Donor to determine alternative payment plans and if required, a new naming opportunity based on the amount of the gift that has been received. Foundation President shall notify Foundation Executive Committee and Finance Committee Chair of gift status.
3 years	The naming rights for the original naming opportunity expire and a case for revocation is presented to the appropriate governing body. The Foundation shall offer the Donor an alternative naming opportunity whose value is based on the received gift amount. Naming rights term for the new naming opportunity shall be the naming term less the period of time the Donor has received physical recognition for the initial naming opportunity. Foundation President shall notify Foundation Executive Committee and Finance Committee Chair of gift status.

9.4 FIRST RIGHT OF REFUSAL

9.4.1 GENERAL

- the naming term of College assets is 10 years from the date of recognition signage installation/unveiling;
- the naming of the College and the College campus shall be named as long as the College operates on the same land. College assets named in perpetuity are on an exception basis must be approved by the College President;
- the original donor has the right to make another gift (on the entity already named) before a naming opportunity is made available to others;
- the original donor should respond within a reasonable time not to exceed ninety (90) days;
- it is expected that a renewing donor to a named space will provide a gift that reflects the current value of the space, not the original value.

9.4.2 PROCEDURES

- re-evaluate value associated with the identified named space at the end of each time period to keep current with comparables in the market;
- if the existing donor does not wish to renew their gift, the donor's name shall be removed from the named space, but shall be kept on the permanent name recognition or donor wall or in perpetuity;
- if the existing donor wishes to renew their gift, the donor shall be required to complete a new gift agreement or pledge form with terms appropriate at the renewal time;
- see Section 9.0, *Renaming, Adding or Removing Names*.

10.0 ETHICAL PRACTICE

All recognition of private support will be independent of all appointment, admission, and curriculum decisions at George Brown College in keeping with the College's established practices as defined by the Ministry of Training, Colleges & Universities.

11.0 MANAGEMENT OF RECORDS

The Foundation will be responsible for maintaining and updating an inventory of all named facilities and funds, other than student awards, the records of which are maintained by the GBC Student Awards Office.

From time to time the College may hold donor recognition events hosted by the GBC Foundation.

12.0 POLICY MANAGEMENT

The management of the policy, education, monitoring, implementation and amendment is the responsibility of the Foundation President.

POLICY:

APPROVING AUTHORITY:

EFFECTIVE DATE:

MANDATED REVIEW:

DONOR RECOGNITION & NAMING POLICY

BOARD OF DIRECTORS

OCTOBER 12, 2017

OCTOBER 12, 2020