



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

**THE CHANCELLOR'S POLICY ON
NAMING UNIVERSITY FACILITIES AND UNITS**

Section 1. Responsibility and Procedure for Naming Facilities and Units

- A. **Naming Responsibility.** The act of naming a facility or unit shall be that of the Board of Trustees, acting after receiving the recommendation of the Chancellor. Benefactors or honorees should be informed throughout the naming discussions that final naming approval for all University facilities and units rests with the Board of Trustees.
- B. **Chancellor's Responsibility.** Subject to the responsibilities of the Board of Trustees, the Chancellor shall have responsibility and authority with respect to and is an essential participant in all naming actions.
1. No facility or unit may be named without the early knowledge and prior approval of the Chancellor. The Chancellor shall endeavor to determine that the proposed action is consistent with the interests of the University, to assure that the amount of the contribution warrants the action proposed, and to maintain equity in the relationship of donations for similar naming actions.
 2. For academic units, the Chancellor shall also seek and receive the advice of representative members of the faculty, staff, and students of the unit that is directly affected by the proposed naming action before acting on the proposal.
 3. The Chancellor may recommend exceptions to any of the following naming policies, subject to approval of the Board of Trustees and after consultation with University leadership when appropriate.
- C. **Procedure.** Proposed contribution levels for naming facilities and units, as well as information about potential benefactors or honorees, must be routed through the responsible Dean or equivalent officer to the Chancellor's Advisory Committee on Naming University Facilities and Units **before** naming opportunities and/or gift levels have been discussed with prospective benefactors or honorees.
1. Detailed instructions for submitting naming requests to the Committee are available from the Office of University Development.

2. After a naming has received final approval from the Board of Trustees, the requesting school or unit should immediately contact the University's Office of Space Management Team in Facilities Planning to ensure that the naming is communicated to University data systems and to the emergency response groups that serve the University.
 3. Depending upon the nature and scope of the naming of a facility or unit, a broader communications plan may need to be initiated by the requesting school or unit to ensure that other units on campus are aware of the new or changed name. If the message is to be communicated broadly externally, the requesting school or unit should coordinate with the Office of University Relations.
 4. Exterior and/or interior signs for a naming must follow the University's official guidelines for signage. If a naming is part of new construction or a major renovation, the designated contact in Facilities Planning and Construction will obtain signs. Otherwise, Facilities Services will produce and install regulation signs.
- D. **Review.** The naming policy shall be reviewed periodically by the Office of University Advancement with all recommended changes requiring approval by the Chancellor and Board of Trustees.

Section 2. The Chancellor's Advisory Committee on Naming Facilities and Units.

- A. **Establishment and Source of Authority.** Consistent with the Board of Governors' Delegation of Duty and Authority to Boards of Trustees, which delegates to the Board of Trustees the authority to approve the names of all individuals and organizations on whom it is proposed that an honorary distinction be conferred by the University, and as a means of guiding the development of recommendations to the Board of Trustees for naming University facilities and units, the Chancellor's Advisory Committee on Naming University Facilities and Units (hereinafter referred to as "the Committee") is hereby established as a permanent committee.
- B. **Membership.** The Committee shall consist of not fewer than six nor more than twelve members, the majority of whom shall be appointed from among current or former members of the University faculty, staff, and administration, and all of whom shall be persons with a thorough knowledge of the University and a wide familiarity with the kinds of individuals and organizations that are likely to be subjects of proposed naming actions.
1. **Selection and Terms.** All members of the Committee shall be appointed by the Chancellor. Members, except as described below, shall be appointed for a regular term of two years. Initial terms shall be so arranged that not all terms will expire in the same year. Each appointment to a regular term shall become effective on 1 July of the appropriate year. Each member shall serve for the term for which appointed and until a successor is appointed. A member who is appointed to fill a vacancy occurring before the expiration of the term of a regular member shall serve for the remainder of that term. Any member may be appointed to serve successive terms, not to exceed two successive terms. The Chancellor may remove any committee member at his/her discretion.

- (a) **Chair.** The Chair of the Committee shall be appointed by the Chancellor and shall serve permanently unless otherwise directed by the Chancellor. In the absence of the Chair, the Vice Chancellor for University Advancement shall preside.
- (b) **Ex-officio Members.** There are three ex-officio members as follows:
- 1) The Vice Chancellor for University Advancement serves permanently and is a voting ex-officio member of the Committee.
 - 2) A representative from the Office of Engineering Information Services who serves permanently unless otherwise directed by the Chancellor and who is a non-voting member of the Committee and
 - 3) A representative from the Office of University Development who serves permanently unless otherwise directed by the Chancellor and who is a non-voting member of the Committee.
- (c) **Committee Support.** The Secretary of the Committee shall be a representative of the Office of the Vice Chancellor for University Advancement and shall provide support for the committee's activities, including preparing meeting materials, taking minutes, and preparing naming requests for the Board of Trustees. The Secretary is not a voting member of the Committee. The Committee may call upon any University employee for assistance in the performance of its duties.

C. **Function.**

1. **Role.** The Committee shall be an advisory body to the Chancellor and shall have no policy-making or administrative authority.
2. **Duties.** The Committee shall advise the Chancellor in confidence with respect to proposals to name or change the name of University facilities and units, consistent with the policy and procedures set out in Section 3, below.
3. **Meetings.** The Committee shall meet at such times and places as required to efficiently perform its duties. Meetings shall be called by the Chair. A simple majority of the membership of the Committee shall constitute a quorum. No proxy shall be recognized in any meeting of the Committee.

Section 3. Naming Facilities and Units.

A. **Purpose, Propriety, and Due Diligence.**

The act of naming a University facility or unit for a person, a family, or an organization is the conferral by the University of a high and conspicuous honor, bestowed upon those who have made a substantial and sustained contribution to the University or have brought special distinction to the University, to the State, or to society at large by services rendered. The act of naming a facility or unit is to be taken discreetly, advisedly, soberly, and with concern for how that action will be viewed in the retrospect of decades. In recommending the conferral of a naming honor on individuals or

organizations, the Chancellor's Advisory Committee on Naming Facilities and Units shall evaluate the whole legacy of those individuals or organizations on the basis of standards relevant to the honoree's own time. In the case of historical persons or entities, it is constructive also to view the proposed naming by contemporary standards to ensure that the naming is appropriate.

1. It is the policy of the University that facilities or units of the University may be named for individuals or organizations in consideration of financial contributions made to the University.
2. A facility or unit may be named for a University faculty member, staff member, administrator, alumnus or trustee, or for a public servant or elected official, who is being honored solely for services rendered to the University, State, nation, or society-at-large. Great care must be exercised in bestowing this honor because of the large number of facilities and units that require the private financial support that ordinarily generates a naming honor. Moreover, the consideration for a naming solely for service shall not be undertaken by the Committee until that person (1) shall have been deceased for not less than one year or (2) shall have been retired, resigned, or otherwise separated from service of or to the University for not less than one year. If, however, a proposed naming under the provisions of this paragraph is in response to a financial contribution, the requirement of a delay shall not apply.

B. Naming Facilities.

1. "Facility" means every building, addition to a building, space in a building, outdoor space (such as garden, court, plaza, memorial, or marker), street, and other tangible and relatively permanent feature located on University property.
 - (a) Naming opportunities may include (1) **new** facilities that are to be constructed or acquired, (2) **existing** facilities that are undergoing major or minor renovations, or (3) **existing** facilities that are not undergoing renovations.
 - (b) If the facility is a permanent **outdoor memorial or marker** to honor persons and organizations, the requesting school or unit shall be governed by the *Policy On Standards And Procedures For Authorization And Placement Of Permanent Outdoor Memorials And Markers On Campus*.
2. Corporate or other organization names may be used to name any University facility. As with individuals honored with facility namings at the University, corporations or organizations proposed for facility namings should have a positive image and demonstrated integrity.
 - (a) In the instance of corporate or organizational namings of facilities, additional due diligence should be taken to avoid any appearance of commercial influence or conflict of interest.
 - (b) Signage reflecting a corporate or organizational naming of a facility must conform to all University signage guidelines and may not include the organization logo or other components of branding.

3. A gift for naming a facility ordinarily should equal:
 - (a) At least one-third of the total project cost for constructing or acquiring the **new facility**; or
 - (b) At least one-third of the total project cost for renovating an **existing facility**; or
 - (c) At least one-third of the portion of the total project cost that is to be raised from the private sector if State or other funds are funding a portion of the project cost for a **new or renovated existing facility**; or
 - (d) At least one-third of the replacement cost of an **existing facility not undergoing renovation**. Typically, but not always, three-fourths of a gift to name an existing facility not undergoing renovation will be in the form of endowment, preferably unrestricted endowment, to the University unit.
4. When a facility to be named is closely related to a school or department, representative members of its faculty, staff, and students shall be consulted before the Committee, Chancellor or Board of Trustees acts on the naming proposal.
5. Financial contributions resulting in the naming of a facility may be made to an affiliated foundation, but these contributions—excluding expendable contributions, which are temporarily held in University money market accounts—shall be invested in and managed by the University of North Carolina at Chapel Hill Foundation Investment Fund, Inc. If the University is constructing or renovating a facility, then funds will be transferred to the University.

C. Naming Units.

1. “Unit” means every school, department, center, institute and other organizational entity of the University.
2. Corporate or other organization names **may not be used** to name a University unit.
3. A gift for naming a unit ordinarily should:
 - (a) Equal at least three-fourths endowment for the benefit of that unit, preferably with a portion of that amount in the form of unrestricted endowment, and
 - (b) Be determined by the size, operating budget, national ranking, and visibility of the unit, as well as naming amounts of peer units in the discipline or on the University campus when available, and
 - (c) Be substantial and significant, even transformative in nature, enabling the unit to improve its competitiveness or distinction, or perhaps enabling the establishment of a new program within an existing unit.

4. When a unit to be named is closely related to a school or department, representative members of its faculty, staff, and students shall be consulted before the Committee, Chancellor or Board of Trustees acts on the naming proposal.
5. Financial contributions resulting in the naming of a unit may be made to an affiliated foundation, but these contributions—excluding expendable contributions, which are temporarily held in University money market accounts—shall be invested in and managed by the University of North Carolina at Chapel Hill Foundation Investment Fund, Inc.

D. Status of Contribution at the Time of Naming.

1. When a facility or unit is to be named in consideration of a financial contribution, the gift shall have been received by the University or affiliated foundation, or its future receipt shall be assured through the appropriate signed gift agreement, before a naming action shall be taken, as follows:
 - (a) **Pledges** to be paid over a period of time, typically up to five years, are acceptable for current naming of facilities and units when at least 50% of the pledged amount has been received and a signed pledge payment agreement for the remainder is also in hand.
 - (1) If the pledged donation is to name new construction, renovation, or other projects with cash-flow considerations, the timing of the pledge payments should be such that sufficient current dollars are available to cover project costs.
 - (b) **Irrevocable planned gifts** may generate current naming of facilities and units if current cash flow considerations are not an issue for the requesting facility or unit. Irrevocable planned gifts will be credited at their present value and particular emphasis will be given to the predictability of the long-term value of the irrevocable deferred gift.
 - (c) **Combinations of revocable planned gifts and cash** may occasionally generate current naming opportunities under the right circumstances. Each combination request must be explained fully to the Committee and a case made for the appropriateness of the naming given the specifics of a particular gift. Particular emphasis will be given to the cash flow requirements of the requesting facility or unit, the predictability of the long-term value of the revocable deferred gift component, and the predictability of its receipt.

E. Duration and Modification of Namings.

1. The duration of a benefactor's or honoree's name on any facility or unit ordinarily continues for as long as the facility or unit is used in the same manner or for the same purpose for which the naming occurred. Upon demolition, replacement, substantial renovation, redesignation of purpose, or similar modification of a named facility or unit, the University may deem that the naming period has concluded.

- (a) The appropriate University representative will make all reasonable efforts to inform in advance the original benefactors or honorees or their surviving family members when the naming period is deemed to have concluded.
 - (b) The University may, but is not required to, provide for the appropriate perpetuation of the previous name. Perpetuation of the original name in an equivalent naming is not required. Appropriate perpetuation of previous names may include, for instance, a plaque in or adjacent to new and renovated facilities.
 - (c) In the event of a corporate or organization naming of a facility, if the corporate or organization name changes, the University may deem that the naming period has concluded. For additional considerations when corporate or organization name changes occur see Section E.5., below.
2. **Renaming.** When the benefactor's or honoree's naming period has concluded, the facility or unit may be renamed, with the original name removed, in recognition of new gifts, subject to any specific terms and conditions set forth in the original naming agreement and subject to the guidelines in Section E.1., above.
 3. **Joint or Hyphenated Naming.** In exceptional circumstances, additional names may be added to a facility or unit in recognition of an additional gift even if the prior benefactor's or honoree's naming period has not concluded, subject to any specific terms and conditions set forth in the original naming agreement. Hyphenation is one method for jointly naming a facility or unit.
 4. **Term Naming.** In appropriate instances, most often involving a corporate benefactor, a naming may be granted for a pre-determined fixed term, usually 3-5 years. At the end of the term, the name of the facility or unit shall expire but may be renewed with the same or a new name. The gift agreement should clearly specify the period of time for which the facility or unit will be named.
 5. **Benefactor or Honoree Name Changes.** If a benefactor or honoree requests a change to the name of a facility or unit (e.g., due to divorce or corporate merger), the University will consider the request. If approved, all replacement signage and other related costs shall be at the donor's or honoree's expense. For additional considerations when corporate name changes occur, see also E.1.c., above.
 6. **Revocation of naming approval or conferral.** In certain circumstances, the University reserves the right, on reasonable grounds, to revoke and terminate its obligations regarding a naming, with no financial responsibility for returning any received contributions to the benefactor. These actions, and the circumstances that prompt them, may apply to an approved naming that has not yet been acted upon or to a conferred naming.
 - (a) If the benefactor's or honoree's reputation changes substantially so that the continued use of that name may compromise the public trust, dishonor the University's standards, or otherwise be contrary to the best interests of the University, the naming may be revoked. However, caution must be taken when, with the passage of time, the standards and achievements

deemed to justify a naming action may change and observers of a later age may deem those who conferred a naming honor at an earlier age to have erred. Namings should not be altered simply because later observers would have made different judgments.

- (b) If the benefactor fails to maintain payments on a pledge upon which the naming was bestowed, the naming may be revoked.
- (c) If a planned gift upon which the naming was bestowed does not result in the value agreed upon, the naming may be revoked.

Section 4. Effective Date.

This revised policy shall become effective September 23, 2010 for all namings except that:

1. Sections 3.B.3 and 3.C.3. (related to gift amounts and gift designations) and Section 3.D. (related to the status of contribution) do not apply to any namings that have been approved by the Board of Trustees as of the effective date or that are currently in negotiation as of the effective date.
2. Section 3.E (related to the duration and modification of namings) applies retroactively to all existing namings at the University unless the provisions of Section 3.E. conflict with the terms of a previously-signed naming agreement for a facility or unit.


Holden Thorp, Chancellor