



CalPolyPomona

Philanthropic
Foundation

POLICIES AND PROCEDURES

Subject: Naming, Memorial and Scholarship Gift Policies

**Policy No. 200
Revision 02/23**

1. Naming Policy

The "naming" of any facility or program at the university is governed by the current "[CSU Policy Number 15501.00 Title: Naming of California State University Facilities and Properties](#)", and "[CSU Policy Number 15502.00 Policy Title: Naming of California State University Academic and Athletic Programs](#)" as well as any supplemental policy in place at the university. Should there be conflict between campus-based policies and the Chancellor's Office policy, the Chancellor's Office policy supersedes the campus-based policy. The following naming guidelines are derived from the above-mentioned policies and the Chancellors Office Naming Policy Guidelines and Procedures found at the bottom of the aforementioned policy statements.

Under "[CSU Delegation of Authority; Naming of CSU Academic and Athletic Programs](#)" and "[CSU Delegation of Authority; Naming of CSU Facilities and Properties](#)", the campus president has the authority to name individual rooms, limited areas, and individual items or features within buildings, individual landscape items or features, limited outdoor areas, and other minor properties. The president is also delegated authority to approve temporary naming for a facility or property, reflecting natural or geographic features, or reflecting a traditional theme of a university. Each proposal for naming a CSU facility or property shall be considered on its own merits. In all cases, due diligence must be performed and observed to ensure that names given are appropriate to the University."

The campus naming committee will review all requests via the associated gift agreement or other supporting documentation before making recommendations to the University President for final approval.

The committee will consist of the following representatives:

1. Vice President for University Advancement – Chair
2. Vice President for Administrative Affairs or designee
3. Associate Vice President for Development or designee
4. Director of Donor Relations & Stewardship or designee
5. College Dean or Vice President of Division of area being named or designee

In the case of naming where Board of Trustees of the California State University is required, such as facilities or programs, review and consent by the Executive Committee or appropriate subgroup of the Academic Senate will be sought. A correspondence expressing the reviewing body's opinion shall accompany the request for naming consideration forwarded to the Chancellor's Office.

While the decision to name a structure or program is subject to many considerations, the following are recommended for gift naming opportunities at Cal Poly Pomona.

No formal proposals or commitments may be made to donors without prior review and agreement of the University President via the Vice President for Advancement.

2. Special Consideration: Facilities

All naming agreements associated with equipment or facilities must be for the useful life of the room/equipment/facility or for a period of years. Absent extraordinary circumstances, the useful life of a building is defined as until the facility is destroyed or substantially renovated.

Useful life is determined by the university. Typically, the shell of a building may last for 50 years or more, but the interior and the building systems (electrical, heating/ventilation) can be expected to be renovated at least twice if not more times depending on the needs of the facility and/or programs housed. When naming an interior room of a building, the naming is only good for the useful life of that room rather than the building facility as a whole as the shell may last longer than the useful life of the room due to expected interior renovation needs.

Gift levels for naming

1. Facilities and properties: Consideration will be made on a case-by-case basis. Per CSU policy, the gift amount must be greater than or equal to a minimum of 10 percent of new capital improvement costs or the appraised value of existing property. Research by the Council for Advancement and Support of Education (CASE) indicates industry best practice of 50 percent of construction costs of new facilities and 30 percent of the replacement cost of an existing facility.

For new construction projects to receive priority consideration from CSU Capital Planning, Design and Construction, the gift should be designated for capital expenditures related to the acquisition, design, construction and/or equipment of the project. Payment of the gift needs to be paid in full within five years and pledges must be binding.

Per CSU policy, facility or property valuation should consider the relative marketability of a facility or property, including the utility, location and precedence of similar namings within the California State University

2. Endowing an entire college or program: Consideration will be made on a case-by-case basis, but the gift must be an endowment at such an amount that it is sufficient to generate income at a significant percentage (at least 10%) of the annual operating budget using a calculation of 4% earnings per year or the percentage anticipated by the current endowment distribution policy.

a. The naming of a college, department, or unit (e.g., The Collins College of Hospitality Management) provides one of the ultimate vehicles for assuring long-term program prestige and excellence. Endowments of such magnitude should enable the recipient unit to achieve and sustain national stature through recruitment of outstanding faculty and students. Although the amount needed is negotiable, the ideal endowment gift should produce sufficient income to cover a significant percent of the college, department, or other unit's annual budget.

b. Before any negotiations are made with a potential donor, the dean of the prospective area must consult with and receive the approval of the president and provost via the university advancement vice president.

3. Naming sub-units (rooms/laboratories/equipment): Consideration is made on a case-by-case basis using square footage, room type (lab/classroom) and existing named like spaces. Minimum gift levels will also take into consideration the visibility of the facility, the nature of the activity housed in the named area, and other relevant factors.

4. Outdoor features/fixtures/memorial items: Donor must cover total direct costs and as required, an endowment for upkeep. Numerous opportunities exist to name places and landmarks in memory of family or friends or in honor of donors who make substantial contributions toward landscape improvements that would enhance the beauty and utility of the campus. Naming opportunities for physical memorials are determined on a case-by-case basis and may require additional approvals. If no endowment is established to maintain the outdoor feature/fixture, the naming agreement(s) must be for the useful life or for a specified period of years. All inquiries about establishing physical memorials need to be directed to the Director of Donor Relations. Attempts will be made to meet the donor's preference, but this will be done after reviewing the request with the Naming Committee in order to determine; a) the appropriateness of the memorial, i.e., the impact the memorialized has on the University, length of service, etc.; and b) the gift amount required to establish the physical memorial proposed location and type of memorial in fitting with the university's existing landscaping. Once a memorial has been approved, the Director of Donor Relations will work with the donor and/or college on text and design for the plaque/signage, will place the order, and oversee installation. All contributions must be received prior to beginning construction.

5. Gifts of real property

Outright gifts of real property may carry the name of the donors provided adequate funds are available for space and operational needs. An outright gift of land that is accepted by the university and held for research, extension, or instruction purposes may be named in honor of the donor. All naming agreements associated with land or property must be for the useful life of the land or property or for a period of years.

3. Minimum Gift Level Policy

In order to meet the terms of endowed funds and the needs of the campus, the following minimum amounts are required to establish a named endowment or named opportunity. If an endowment or named opportunity is to be set-up at an amount lower than any listed below, it requires discussion and verbal approval by the Vice President of Advancement prior to any gifts being made or agreements being signed. The final approval will be formalized via the associated Gift Agreement.

Minimum Gift Levels

Opportunity	Endowment Minimum	Cash/Term Minimum (5 year)	Estate Minimum	Description
College	\$15,000,000 - No upper limit	N/A	Present Value of Commitment must equal the Endowment Minimum	The naming of a college (e.g., The Collins College of Hospitality Management) provides one of the ultimate vehicles for assuring long- term program prestige and excellence. To be negotiated based on the size of the unit.
Department or Unit	\$2,500,000 - \$25,000,000	N/A	Present Value of Commitment must equal the Endowment Minimum	The naming of a department, or unit provides one of the ultimate vehicles for assuring long- term program prestige and excellence. To be negotiated based on the size of the unit.
Deanship or Dean's Chair	\$2,000,000	\$600,000	Present Value of Commitment must equal the Endowment Minimum	Endowed fund to support a dean. Provides the competitive edge in attracting and retaining deans who have demonstrated outstanding accomplishments and leadership.
Endowed Chair	\$2,000,000	\$500,000	Present Value of Commitment must equal the Endowment Minimum	Endowed fund to support an endowed chair. Provides the competitive edge in attracting and retaining senior or junior faculty who have demonstrated leadership to run a program or university center.
Professorship	\$1,000,000	\$250,000	Present Value of Commitment must equal the Endowment Minimum	Endowed fund to support an existing professor. Provides the competitive edge in attracting and retaining senior or junior faculty who have demonstrated outstanding accomplishments or show remarkable promise. It can also support a visiting professor for a one to three-year period.
Center or Institute	\$1,000,000 - \$7,000,000	\$500,000	Present Value of Commitment must equal the Endowment Minimum	The naming of a Center or Institute provides one of the best vehicles for assuring long- term program prestige and excellence. To be negotiated based on the size of the unit.

Opportunity	Endowment Minimum	Cash/Term Minimum (5 year)	Estate Minimum	Description
Faculty Fellowship	\$250,000	\$100,000	Present Value of Commitment must equal the Endowment Minimum	Establishes a faculty position on a term basis to enable the pursuit of promising research. Faculty Fellowships promote faculty development by providing summer or sabbatical stipend plus expenses for tenure track faculty to pursue research, curriculum or service projects. Post-Doctoral Fellowships invigorate a particular discipline by bringing young scholars to conduct research and engage with faculty and students.
Lectureship or Seminar Series	\$100,000	\$40,000	Present Value of Commitment must equal the Endowment Minimum	To establish an endowment for visiting professors that provides continuous support for a lecture series. Lectureships enable the University to support a faculty member in developing and teaching a new course curriculum or to bring distinguished scholars, writers, and artists to campus to engage faculty and students for a defined period of time.
Graduate Student Scholarship	\$200,000	\$40,000 (annual \$8,000 award)	Present Value of Commitment must equal the Endowment Minimum	Endowment for a scholarship covering educational expenses. Can also be used for research. Educational expenses include tuition and books only = \$8,895
Undergraduate Student Fellowship	\$100,000	\$20,000 (\$4,000 annual award)	Present Value of Commitment must equal the Endowment Minimum	Covers a stipend for a student conducting research and/or travel needs.
College/Department Faculty Development Funds	\$100,000	\$20,000 (\$4,000 annual award)	Present Value of Commitment must equal the Endowment Minimum	In support of faculty developing their careers through study, research, travel, publishing, and professional activities.
Named Endowed Fund	\$50,000	N/A	Present Value of Commitment must equal the Endowment Minimum	Donor-restricted gift to the university for purposes not defined elsewhere in this grid.
Equipment Fund	\$50,000	\$10,000 (\$2,000 annual award)	Present Value of Commitment must equal the Endowment Minimum	To support the purchase of educational equipment, donors will be recognized by a plaque attached to or placed near the item, if feasible.
Named Term Scholarship	N/A	33% of the cost of tuition for a minimum of 4 years	Not permissible	The naming of an annual scholarship for a period of 4-5 years provides a way to support students over multiple years without having to create an endowed scholarship. Estimated total gift amount to be \$10,000 in FY2022/2023.

Named Term Non-Scholarship Fund	N/A	Cover at least 50% of all costs associated (Minimum of \$10,000)	Not permissible	The naming of a term non-scholarship fund provides a way to support the university.
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4. Scholarship Gifts to Department-Specific Areas

Donors wishing to support students within a specific college, major or programs may direct gifts to the general excellence scholarship funds that have been established for departments and programs to accept scholarship gifts online at: [CPP Giving](#).

The department and college general excellence scholarship accounts are also used to process donations under \$10,000 that do not require a separate named account. Colleges and departments are responsible for administering these scholarship funds with a goal of awarding all available funds within that account during the university’s scholarship timeline. The objective is to award all gifts received from July through February during the spring semester selection process so that they can be awarded to the student in the fall semester. Finally, donors who wish to support the underrepresented students from across the University may direct gifts of any amount to the Diversity, Equity and Inclusion Scholarship Fund.

Each College and academic department are responsible for administering their department-named scholarship funds by using the university’s central scholarship application software.

5. Scholarship Restrictions and CA Proposition 209

Cal Poly Pomona is committed to awarding scholarships in an objective, transparent and equitable manner that supports our student’s success. Aligning with CSU Scholarship Administration Guidelines and California Proposition 209, scholarship criteria should not include race, gender, color, ethnicity, or national origin.

Questions regarding interpretation of criteria will be directed to the university’s gift acceptance committee and/or legal counsel. In consultation with the CEO of the CPP Philanthropic Foundation, requests for new accounts that require US Citizenship status for recipients must be documented as an exception and approved by the university’s gift acceptance committee. This policy is subject to change in the future based on changes to California law.

Proposition 209 policy: [CSU Proposition 209 Policy](#)

6. Memorial and Honorary Gift Policy

Making a gift in memory or in honor of someone creates a legacy. For memorial and honorary gifts that do not meet the minimum to be establish a named fund, gifts can be made to the general Excellence Fund or Excellence Scholarship fund in a college, department, or unit at the university. If donations total 33% of annual tuition or more the college or unit may choose to give one general scholarship in the decedent’s name.

For memorial gifts in honor of alumni and students that do not meet the minimum to establish a named fund, gifts can be made to the Alumni Association’s Excellence fund. If donations total 33% of annual tuition or more the Alumni Association may choose to give one general scholarship in the decedent’s name.

7. Future Considerations

If future circumstances of the named purpose or program should change or conflict with state law or policies of the University, funds may be redirected under the authority of the University President.

If at any time circumstances change substantially so that the continued use of the Donor name may compromise the public trust, the University and/or Foundation may consult or seek advice from counsel regarding future action and potential removal/non-use of name.