
Naming Policy

Recognising philanthropic contributions and individuals of distinction



Context and Purpose

As philanthropy plays an increasing role in realising the school's ambitions, we have a strong interest in seeking to recognise donor generosity through the naming of buildings, facilities, and other areas of activity. This allows us to demonstrate the pride we feel in our close associations with those who choose to prioritise us among their philanthropic giving. This in turn accelerates the development of a culture for philanthropy across the Foundation and helps inspire others to give.

Similarly, by deciding, on restricted special occasions, to name a facility after an individual of high distinction with close associations to this school for reasons beyond philanthropy, we are able to promote and honour our connections with those individuals.

Purpose of the policy

Part 1: This policy:

- 1.1. Ensures that naming recognition decisions are made in a coherent and consistent way in accordance with the Foundation's objectives, strategy and statutes.
- 1.2. Ensures compliance with wider school regulations and procedures
- 1.3. Establishes the processes and criteria for
 - 1.3.1. decision-making for approval of naming recognition;
 - 1.3.2. duration of naming recognition;
 - 1.3.3. potential revocation of naming recognition.
- 1.4. Ensures that the rationale for naming recognition decisions can be clearly articulated.

Application

This policy will apply where:

- 1.5. The School has received a high-level philanthropic gift under the criteria set out in Part Three (below), and wishes to recognise the donor's generosity;

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1.6. The School wishes to name a significant element of the Foundation Estate, as defined in 2.2. after an individual of distinction, where there is no connection to philanthropy.

Updates to this Policy

1.7. Future updates and changes to this policy will be approved by the following committees: Development Committee, Council

Overview of Remainder of the Policy

1.8. There are three additional parts to this Policy:

Part Two sets out an over-arching process, with associated definitions, for naming of significant elements of the Foundation Estate.

Part Three details the process and criteria for the management of naming recognition connected to philanthropy across all aspects of the School's activities.

Part Four details the process and criteria for the management of naming recognition in honour of individuals of distinction, connected to significant elements of the Foundation.

Part Two: Process for naming of any significant part of the Estate

2.1 Any potential naming of any significant part of the Foundation (as defined in 2.2.), whether in recognition of philanthropy or to honour individuals of distinction, will be considered by the Development Committee, followed by Council.

2.2. For the purposes of this policy, the definition of a 'significant' part of the Foundation includes buildings, wings of buildings, and significant high-profile spaces within buildings and substantial external public realm spaces. In cases where there is any doubt as to whether part of the Foundation is considered 'significant' for the purposes of this Policy, the Chairman of Council should be consulted.

2.3. In the case of naming of buildings, the Headmaster and the Chair of the Development Committee will be consulted before any case is considered by the Development Committee.

2.4. Processes for naming recognition for elements of the Foundation not considered significant (as defined under 2.2) are covered in Part 3 (where relating to philanthropy) and Part 4 (relating to individuals of distinction).

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Wider considerations for all Estates-related gift recognition

2.5. Any naming recognition on the school site must comply with any legal agreements entered into by the School, such as wider funding agreements or limitations imposed by the planning authorities.

2.6. Any resulting naming recognition signage for capital projects will be in line with the School's corporate identity, and corporate or organisational logos will only be included when not to the detriment of the School's brand.

Part Three: Naming Recognition relating to Philanthropy Application

This part of the policy will be relevant when:

3.1. The School wishes to acknowledge a benefactor who provides high-level funding towards the cost of construction or refurbishment of a building or part of that building, or provides high level support for other areas of the school

Process for Identifying Naming Opportunities

3.2. The Development & Alumni Office, working closely with the Development Committee, will be responsible for identifying and confirming the circumstances where the School may wish to recognise the generosity of donors via an appropriate naming. The Development Committee has responsibility for ensuring all naming opportunities relating to philanthropy conform to this Policy and are approved according to the processes outlined below, before they are discussed with prospective donors.

3.3. Where naming opportunities can be identified at the outset of a project (e.g. for specific capital programmes) these will form part of the fundraising strategy for that project.

3.4. Naming opportunities will also be encouraged and considered for existing buildings, and other activities, as set out in the remainder of this Section.

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Criteria for Naming recognition connected to philanthropy

3.5. In determining the appropriateness of considering naming recognition in a particular circumstance, the following factors will be considered:

3.5.1. Whether the gift level committed for the specific priority in question meets the gift level guidelines within this Policy, as summarised under 3.6.

3.5.2. The appropriateness of associating the donor's name, or the preferred name suggested by the donor, with the School. Gift discussions reaching this stage of development will already have been considered by the Development Committee in terms of the acceptability of the source of funding, and any reputational risk identified by that group which may be relevant to a naming opportunity will be borne in mind.

Gift Level Guidelines

3.6. The recommendations below suggest an appropriate range of donation levels where the School may wish to recognise the generosity of a donor.

3.6.1. For capital gifts for new buildings and equipment, the value of the donation should normally meet a minimum of 50% of the estimated cost of the building/facility. However, an amount ranging from 35% to 70% may be considered appropriate depending on circumstances. A more flexible approach may be appropriate for naming of existing buildings and facilities, but the estimated current value of that building will provide an appropriate starting point for the above percentage guidelines.

3.6.1.1 By default the building/facility will be named for a period of at least 10 years. The School will discuss this with the donor on a case by case basis.

3.6.2. Naming proposed for ornamental features such as fountains, landscaping, or benches whether new or existing, will normally require the gift to cover the full cost of the feature and a maintenance fund at a level agreed with the Estates Manager.

3.6.3. For bursaries, the School will not normally consider naming recognition for specific awards for donor commitments below 110% of the School fees (in order to enable a full UCS experience as well as education), alongside a commitment from the donor to fund the agreed bursary programme for the full duration of the pupil in question. The Bursary would be named only for the duration of the gift.

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Endowed Gifts

3.7. Where naming recognition is considered in relation to endowed gifts for activity, the estimated annual income from the capital sum donated should broadly meet the annual levels indicated in 3.5.3 to 3.5.7 above.

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Duration of Naming recognition relating to Philanthropy

3.8. Consideration will always be given to the term for which naming of any facility or activity should be conferred, following the guidelines below:

For naming of significant parts of the Estate (as defined under 2.2)

3.8.1. For new buildings and facilities or parts thereof, it will be customary to specify a period of time for which naming is conferred. It is expected that this naming period will default to 10 years, but this will be discussed by the donor and the Foundation on a case by case basis. If appropriate and possible, after that period has expired the donor will be given the opportunity to renew their gift for the prolongation of the naming for another agreed period. Equally, the School may consider that the strength of brand and reputational benefit of the existing naming justifies a continuation of the naming with no further gift support.

3.8.3. For naming recognition relating to bursaries and other activities, naming recognition will normally be agreed to cover only the period of time over which philanthropic income meets the guideline contribution levels as set out under 3.5. This also applies for endowed gifts, where a minimum of 50 years for permanent endowments is appropriate, and a shorter period for expendable endowments, depending on the detail of gift agreements. In all cases (whether endowed or recurrently funded) an indication of the likely duration of naming recognition should be included in gift agreements.

Revoking of naming recognition

3.9. Both the donor and the School may reserve the right to revoke a particular naming, particularly in the development of a reputational risk to continued mutual affiliation, but in these highly unlikely circumstances the School has no financial obligation to return any received contributions to the donor. Where the School wishes to consider revocation of an existing naming recognition, this will be considered initially by the Development Committee and subsequently, at the discretion of the Chairman of Council.

3.10. If the donor is unable to fulfil agreed gift instalments on a multi-year pledge upon which the naming was bestowed, the School reserves the right to withdraw the specific agreed naming, while seeking to negotiate an alternative and appropriate recognition opportunity with the donor.

Changed circumstances or priorities relating to an existing named activity or facility.

3.11. In circumstances where the purpose of the building, facility, bursary or other activity in question change considerably during the agreed period of naming recognition (through the need for redevelopment for example), reasonable effort will be made to notify the donor or their representatives, and to discuss whether there might be any impact on the intended use

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of their gift. Every effort will be made to honour the intention of the original gift and to identify alternative appropriate naming recognition opportunities, to address the circumstances in mutually-agreeable ways.

Process of Approval of Naming recognition relating to Philanthropy

3.12. The Heads of each school within the Foundation are expected to contact the Development & Alumni Relations Office about potential naming recognition before discussing them with prospective donors, in order to ensure that all naming recognitions adhere to this policy.

Approval for Capital Projects

3.13. For potential naming recognition relating to significant elements of the School's Estate (as defined under 2.2), the Development & Alumni Relations Office will liaise with the Headmaster, confirming that the criteria within this Policy have been met (or highlighting any exceptions), before consulting as per 2.1 above. The proposal may then be recommended for formal approval by the Development Committee.

3.14. For other naming opportunities relating to less significant elements of the Estate (as defined under 2.2 above), where the above criteria for naming recognition have been fully met, the Headmaster may approve specific naming opportunities, and will confirm the detail of written agreements with donors. Confirmed naming recognitions at this level will be reported to the Development Committee.

Confirming the offer of naming recognition with donors

3.15. Once internal approval has been fully confirmed in line with this Policy, subsequent contact with donors to offer naming recognition may be made by the Development & Alumni Relations Office, or the Headmaster, following consultation with the Development & Alumni Relations Office.

3.16. The Development & Alumni Relations Office is responsible for facilitating and managing the written agreements for naming recognition, which will incorporate the relevant aspects of this Policy.

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Part Four: Naming in relation to Individuals of Distinction

Application

4.1. This part of the policy is concerned with the naming of significant elements of the Foundation Estate (as defined under 2.2 above) after individuals of distinction, where there is no link to philanthropy.

4.2. For namings relating to elements of the Estate not considered significant (as defined under 2.2 above) spaces may be named to honour individuals of distinction without the formal consultation outlined in 2.1 above, provided that the proposal meets with the approval of the relevant Head. In these circumstances, the full range of other options for honouring significant achievements and distinctions should always be fully considered.

Criteria for Naming elements of the Estate after individuals of distinction

4.3. Naming of significant elements of the Estate (as defined under 2.2 above) will be reserved for those who have had a transformational impact on the School or the wider world. Exceptional circumstances where naming of a significant element of the school site might be considered would normally combine:

4.3.1. A wish to honour Individuals with extremely close associations to the School who have made outstanding and sustained contributions to local, or wider international societies and/or global education and

4.3.2. Consideration will also be given to any opportunity cost which may be relevant, should the same element of the Estate have strong potential for attracting high level philanthropic support.

Process of Approval of Naming and Duration for individuals of distinction

4.4. It is essential that no contact is made with any individuals of distinction (or their family, representatives or descendants) who might be the focus of such a naming of part of the Estate, before the proposal has been considered and approved fully in line with this Policy.

4.5. Requests for consideration of specific cases relating to the Estate must include consultation, as outlined in 2.1 to assess the strength of the case against the above criteria (4.3 and 4.4) prior to recommendation to the Development Committee. For cases relating to significant parts of the Estate (as defined under 2.2. above) the Headmaster will be consulted, before it is considered by the Development Committee, which can make decisions for everything up to, but not including, the naming of a building. As for cases relating to philanthropy for the naming of a building, the Headmaster will take such recommendations relating to individuals of distinction to the Development Committee for approval. In the

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case of high-profile buildings, as determined by the Headmaster in consultation with the Development Committee, approval will subsequently be sought from Council.

4.6. Naming recognition connected to significant elements of the Estate to honour individuals of distinction, where approved, will usually be confirmed for a period of between 25 and 50 years of duration.

4.7. Where appropriate, the Development & Alumni Relations Office will be responsible for facilitating and managing written agreements for naming of significant elements of the Estate after individuals of distinction, in line with the wider terms of this Policy.

4.8. The Naming Policy operates alongside the UCS Fundraising and Gift Acceptance Policy.