

Stewardship Closeup: Naming Opportunities



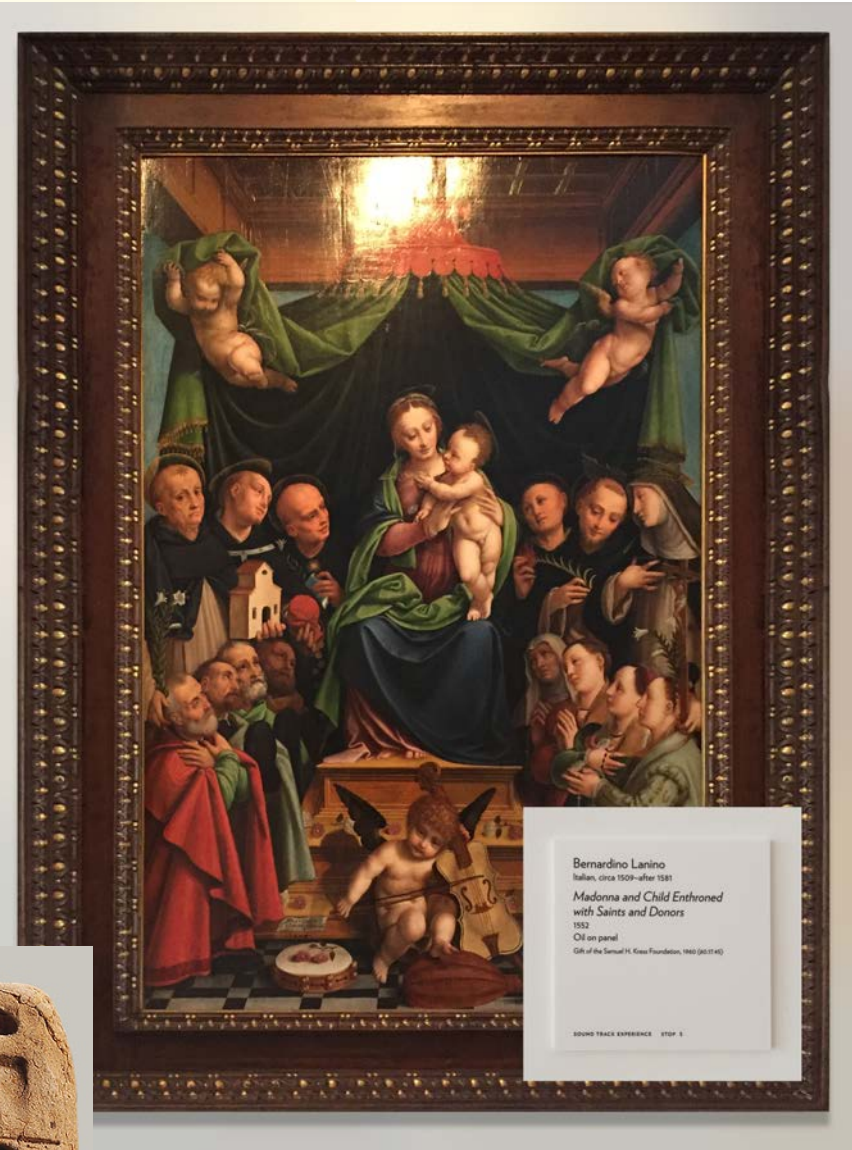
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Creative discovery for complex projects

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History

- Earliest record of human names: slaves, traders and accountants
- Context and point-of-view communicated through recognition hierarchies
- Legacy-building through permanent public recognition



Bernardino Lanino
Italian, circa 1509–after 1581
*Madonna and Child Enthroned
with Saints and Donors*
1532
Oil on panel
Gift of the Samuel H. Kress Foundation, 1963 (201745)

SOUND TRACE EXPERIENCE STOP 2

Increasing volume and variety in types of namings

- Honorific
- Philanthropic
- Sponsorship
- Physical spaces, funds, programs, and staff/faculty positions



Indiscernible variations on a theme

- Sponsorship
- Public-Private Partnerships
- Time-limited naming opportunities



Stakeholders and audiences

- Entity named
- Organization (brand implications)
- Immediate community
- Historical record



Removing a formal naming

- “Useful life” of the space
- Time limitations
- Defamation



Yale University principles on renaming

“There is a strong presumption against renaming a building on the basis of the values associated with its namesake. Such a renaming should be considered only in exceptional circumstances. The presumption against renaming is at its strongest...for someone who made **major contributions** to the University.”

- Is a principal legacy of the namesake fundamentally at odds with the mission of the University?
- Was the relevant principal legacy significantly contested in the time and place in which the namesake lived?
- Did the University, at the time of the naming, honor a namesake for reasons that are fundamentally at odds with the mission of the University?

Yale University Principles on Renaming

Decisions to retain a namesake or rename come with obligations of non-erasure, contextualization and process.

“The University ought to adopt a formal process for considering whether to alter a building name on account of the values associated with its namesake; such a process should incorporate community input and scholarly expertise.”

Wouldn't it be best to create that collaborative, thoughtful process on the front end, before the naming is ever offered to a donor or honoree?

Naming opportunity policy and procedures

- Naming policy
 - Honorific
 - Philanthropic
 - Sponsorship
- Recognition policy
- Advisory bodies
- Review and approval procedures
 - Valuation – formulae, comps and minima
 - Donor due diligence
 - Design review
 - Recordkeeping



Donor recognition standards and guidelines documentation

Section	Detail
Statement of Purpose	<ol style="list-style-type: none"> Mission, Vision and Values statements for the organization Mission, Vision and Values statements for donor relations and stewardship Guiding principles of donor relations and stewardship Statement of the purpose and scope of the donor recognition standards and guidelines Definitions Reference to related policies and procedures including: <ol style="list-style-type: none"> Regulation or governance affecting the standards and guidelines Naming opportunity gift minimums and value calculation models Cancellation of naming rights Timing for donor recognition practices Gift agreement template and regulations Pledge policies Style guidelines List of stakeholders by role and responsibility, with contact information Implementation procedures
Donor Recognition	<ol style="list-style-type: none"> Giving programs by gift category <ol style="list-style-type: none"> Major gifts resulting in naming opportunities Major gift contributions to existing funds Planned giving Annual giving, with any subcategories <ol style="list-style-type: none"> Individual giving Corporate and foundation giving Faculty, staff, physician or employee giving Student or parent giving Grateful patient or beneficiary giving Stewardship activities matrix (what is done, when and by whom) Recognition opportunity location plans (volume may require a separate document) Inventory of named and available opportunities Hardscape products overview
Gift Announcement Protocol	<ol style="list-style-type: none"> Media announcement guidelines Social media announcement guidelines Website announcement guidelines Stationery templates Print collateral templates

Section	Detail
Donor Recognition Products Overview	<ol style="list-style-type: none"> Naming Opportunities Recognition Overview <ol style="list-style-type: none"> Interior Area Naming Sign Components Hierarchy Exterior Area Naming Sign Components Hierarchy Grouped Naming Sign Components Hierarchy Destination Graphic Overview Building Naming Overview Campus Naming Overview Virtual Naming Recognition Overview Centralized Philanthropy Listings <ol style="list-style-type: none"> Cumulative Giving Planned Giving Endowments Tributes and Memorial Gifts Volunteer Recognition Service and Leadership Recognition Electronic Media Content Guidelines Storytelling Venues (Donor testimonials, history exhibits, success stories)
Design Guidelines	<ol style="list-style-type: none"> Fabrication documentation including <ol style="list-style-type: none"> Sizes Materials, finishes and colors Construction methods Layout templates Typical installation guidelines
Implementation Procedures	<ol style="list-style-type: none"> Program support, implementation and maintenance roles and responsibilities Workflow diagram Product ordering information, including order forms and known pricing Assets and access to donor information Record-keeping directives Review and approval process Budget and schedule forecast
Pending Additions	<ol style="list-style-type: none"> Notes and reference to outstanding issues, new circumstances and known improvements to the documentation
Examples	<ol style="list-style-type: none"> Dated record of examples including vendor approvals and photographs of completed projects
References	<ol style="list-style-type: none"> Audit of pre-existing donor recognition, with explanation as available Review of peer institution examples Peer institution surveys or interviews

Design standards

- Materials and branding
- Size
- Content
- Cost



16" **DONOR LAST NAME NAMING OPPORTUNITY DESCRIPTION**
Sample Donor Logo
Formal Donor Name Full Listing
IDR4 - \$1,000,000+

14" **DONOR LAST NAME NAMING OPPORTUNITY DESCRIPTION**
Formal Donor Name Full Listing
IDR3 - \$500,000-999,999

12" **DONOR LAST NAME NAMING OPPORTUNITY DESCRIPTION**
Formal Donor Name Full Listing
IDR2 - \$100,000-499,999

10" **DONOR LAST NAME NAMING OPPORTUNITY DESCRIPTION**
Formal Donor Name Full Listing
IDR1 - \$25,000-99,999

2" **FORMAL DONOR NAME**
IDRX - special uses, such as lockers

6" **224**
Allison Brackett
Data Analyst
Standard wayfinding



IDR-8 | \$10,000,000+

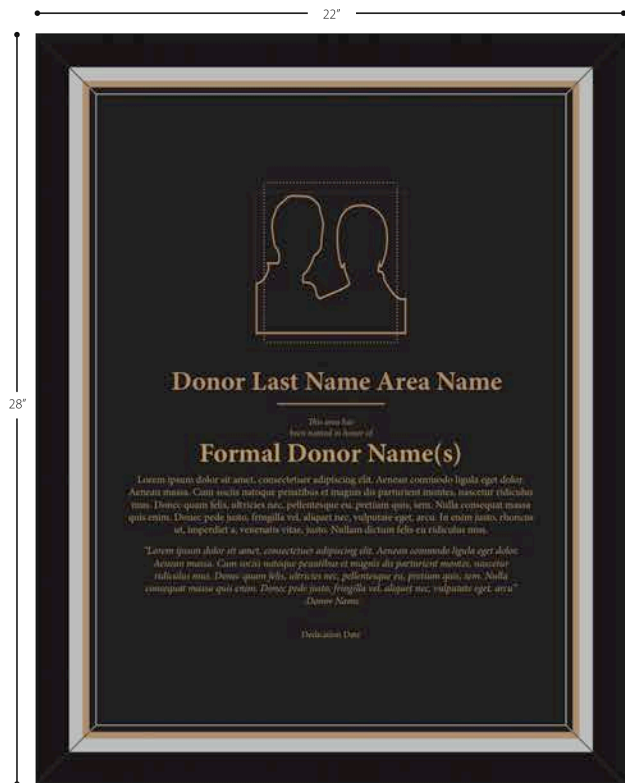
IDR-7 | \$5,000,000-\$9,999,999

IDR-6 | \$1,000,000-\$4,999,999

IDR-5 | \$500,000-\$999,999

IDR-4 | \$250,000-\$499,999

IDR-3 | \$100,000-\$249,999



Specifications:

- Gift Amount: \$10,000,000+
- Outer dimension: 22" w x 28" h
- Location: Mandatory wall treatment
- Interior dimensional letters - 6" h maximum; 1/4" th satin aluminum, pin mounted to treated wall

Plaque:

- Corian "Night Sky" w/ .25" beveled edges
- Etched lettering, infilled w/ Testor's Metallic Gold
- Donor Portrait: Imagecast® bronze w/ hand-rubbed antique finish, 30 sq. in. maximum area, 6" maximum height, stud mounted
- Content: brief philanthropic/community history of donor with GHS and donor challenge statement (1,200 characters maximum)

History Panel:

- Full color digital print with two color copy, duo-tone inset photo or logo, map background, photo collage and 1,000 character story
- Matte laminate on the face
- 1/4" thick PVC backplate
- Filler and shims as required to bring face flush to wall
- Installation example on Page 22

Frame:

- 1.25" wide x 1/2" deep cherry or black frame
- .25" satin brass and .5" satin aluminum perimeter detail

IDR8 \$10,000,000+

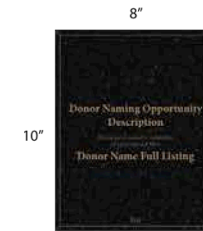
GDR6 | \$1,000,000- \$4,999,999

GDR5 | \$500,000- \$999,999

GDR4 | \$250,000- \$499,999

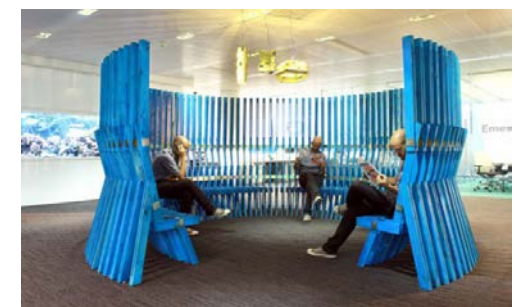
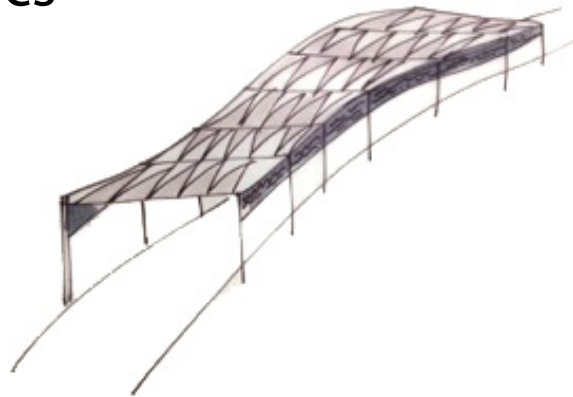
GDR3 | \$100,000- \$249,999

GDR2 | \$25,000-\$99,999



Grouping strategies

- Public recognition of all naming opportunities
- Coordinated large format print or electronics
- Philanthropic placemaking – incorporating an activity



Roles and Responsibilities

- Fundraiser
- Donor relations professional
- Marketing/communications and/or facilities teams
- Outside design and fabrication partners
- Architect
- Donor or donor's representative

RECOGNITION IMPLEMENTATION

GHS Donor Recognition Standards and Guidelines Resources:

- Inventory of naming opportunities
- Inventory of completed namings
- Design Standards
- Gift Minimums
- Policies and formatting directives

Responsibilities Key:

- DO** Development Officer
- SC** Stewardship Coordinator
- VC** Vice President of Advancement
- AS** Advancement Services
- BM** Brand Manager
- F/CA** Facilities/ Campus Architect
- W** Writer
- H** Heurista
- SL** Service Line Manager

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1. SOLICITATION PROCESS

- Identify donor and proposed gift amount
- Negotiate appropriate entity name (if new)
- Draft copywriting
- Site photography/architecture
- Illustration(s) of draft recognition components to augment solicitation package
 - ♦ plaque
 - ♦ history panel
 - ♦ dimensional letters
 - ♦ print
 - ♦ online
 - ♦ draft media announcements and event schedule

2. GIFT AGREEMENT SIGNED

3. DESIGN & IMPLEMENTATION PROCESS

- Finalize copywriting
- Finalize photography/ gathering of names/ logos
- Finalize architectural integration (DR3 & above)
- Layout(s)
- Approval(s)
- Coordinate with Facilities
 - ♦ budget
 - ♦ schedule
 - ♦ installation
- Coordinate with Service Line
- Coordinate with donor(s)
- Supervise Installation
- Product outcome photography

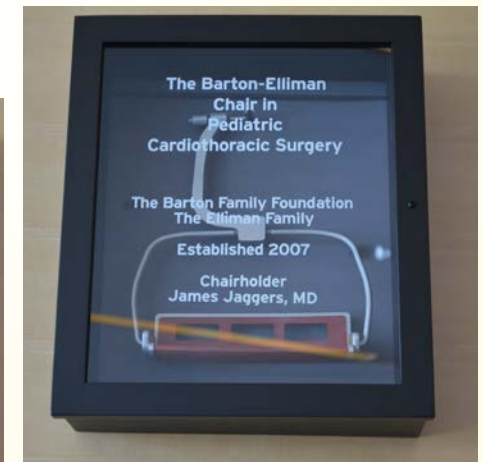
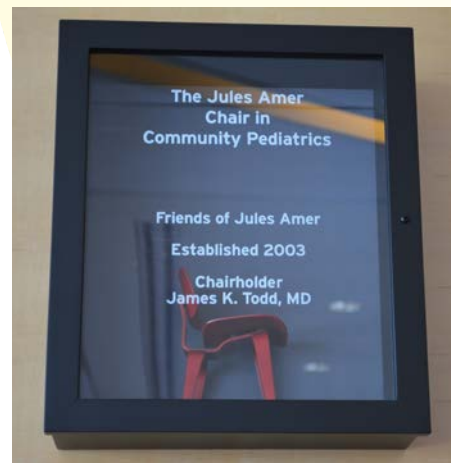
4. RECORD KEEPING

- Update donor record with naming op & product photos
- Update Inventories

GREENVILLE HEALTH SYSTEM | Recognition Implementation | October 2015 | 1

Improving donor relations and stewardship

- Engage the donor in storytelling
- Use the authentic voice of the institution
- Appeal to all audiences
- Plan for change
- Maintain excellent records





Thanks for your participation!

Please email
questions to comments to:

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