

UNIVERSITY OF FLORIDA POLICY
Namings and Memorials

Last Revised: December 4, 2019

1. Definitions

“Academic Unit” means any college, school, center, institute, department, or other academic, research, or administrative program unit.

“Facility” means any building, structure of permanence such as a stadium or tunnel, a major structural component of a building or any such structure such as a wing, floor, or central atrium, or a space within a building that is significant because of its size relative to the whole building or because it serves a significant academic, athletic, administrative, or public function.

“Outdoor Area” means any outdoor area and wholly outdoor structures such as a landscaped area, field, water body, bridge, patio, deck, or road.

“Program” means any academic, research, or service program.

“Site” means any whole campus or any educational, research, recreational, athletic, service, or extension site, including sites subject to Board of Governors Regulation 8.009.

“Space” means any non-structural space within a Facility such as an office, conference room, or non-structural common area which does not otherwise fall within the definition of Facility above.

“University” means the University of Florida and all affiliated entities.

2. General Guidelines and Definitions for Naming Opportunities and Memorials

The University of Florida recognizes the importance of naming opportunities for its buildings, facilities, outdoor and interior spaces, colleges, schools, centers, institutes, and other academic units and programs. The University of Florida is committed to upholding its core values of collaboration, broad diversity, the pursuit of excellence, and freedom of expression, thought, and dialogue. In building partnerships that help to create a better future for the state of Florida, the nation, and the world, the University seeks to maintain academic integrity and independent administration in all of its endeavors. While protecting the values and integrity of the institution, the University also seeks to protect the fundraising process and its relationships with donors and other supporters of the University.

Entity Namings

An Entity Naming is a Gift Naming for any corporation or other organization.

Gift Namings

A Gift Naming is any naming for a donor or, at the request of a donor, for a third party, in connection with a gift. Naming opportunities may be appropriate to recognize a donor whose financial contributions have supported the institution in meaningful ways. Gift Naming opportunities may also arise at the request of a donor who, in connection with a gift, wishes to honor or memorialize someone significant to the donor.

Honorary Namings

An Honorary Naming is a naming to honor or memorialize an individual's significant contributions (financial or otherwise, but not in connection with a specific gift) to the University, the State of Florida, or society in general.

Entity Namings, Gift Namings and Honorary Namings are referred to collectively as Namings.

Memorial

A Memorial is a plaque or other physical device used to recognize or memorialize a person or entity or to name a physical space. Memorials may be associated with Gift Namings or Honorary Namings. The wording for any Memorial shall be reviewed by the Foundation Namings and Memorials Advisory Council prior to submission to the President for approval.

Governing Laws and Regulations

Namings and Memorials approved under this policy shall also be subject to all Florida Board of Governors (BOG) and University of Florida Board of Trustees (BOT) Governance Standards, policies, regulations, and procedures, and to all state laws and regulations.

General Policy Statement

No Naming or Memorial shall be permitted that would detract from the University's values, dignity, integrity, or reputation, lead to an actual or perceived conflict of interest, or imply in any way a political, ideological, commercial, or religious endorsement, nor shall any Naming or Memorial, including quotations, be permitted that could violate any state or federal law, rule, regulation, or constitutional provision.

3. BOT Namings

A BOT Naming is a Naming of any Academic Unit, Outdoor Area, Site, or University Facility, (all as defined above), including but not limited to those for academic, administrative, athletic, or residential purposes. Any BOT Naming will require BOT approval with the recommendation of the University President under the BOT

Governance Standards and in accordance with BOT policies, regulations, and procedures. BOT Namings also include, in the definition of Facility, a Space that is significant because of its size relative to the whole building or because it serves a significant academic, athletic, administrative, or public function. BOT Namings also include any Naming, regardless of type, that is determined after conferring with the BOT Chair to be of high visibility or reasonably considered to be material to UF, a DSO or any affiliate entity.

4. Non-BOT Namings

A Non-BOT Naming is a Naming of any Space within a Facility (except those interior spaces that do require BOT approval as set forth in Paragraph 3 above) or any University Program (all as defined above), including but not limited to those for academic, administrative, athletic, or residential purposes. A Non-BOT Naming does not require BOT approval, unless the BOT Chair requires full BOT participation. Non-BOT Namings will be approved by the President and the BOT Chair, with notice to the BOT Vice Chair.

5. Corporate or Organization Namings (“Entity Namings”)

Donors who are corporations or organizations may be recognized by a Gift Naming. Entity Namings require more consideration and review than Gift Namings for individuals, to avoid actual or apparent endorsements or conflicts. Generally major academic units will not be named after a for-profit corporation or organization and Entity Namings for buildings will usually be for a fixed term of years. Rarely will any Entity Naming be approved when the entity is not the donor or otherwise a supporter of the University.

Entity Namings of a Site, Facility, Outdoor Area, or Space require a written agreement including a stated term of years not to exceed twenty.

Considerations for Entity Namings will be evaluated in terms of whether and to what extent the applicable entity’s value structures are compatible with that of the University and whether the entity and the University are pursuing a co-mission. If an applicable entity’s name is changed following approval of an Entity Naming, the name referenced by the University may be changed following approvals by the President and BOT Chair, with notice to the BOT Vice Chair.

Logos

Entity logos may be allowed for a fixed term of years on external signage on a case-by-case basis and such use requires specific approval by BOT for BOT Namings and specific approval by the President for Non-BOT Namings. All such approvals may be subject to unit restrictions on logo usage as well.

6. Process

Foundation Namings and Memorials Advisory Council

A Foundation Namings and Memorials Advisory Council (“Council”) will be established by the Foundation and will represent academic, business, alumni, and development viewpoints across the UF community. The Council is advisory only and will review Namings and Memorials before they are submitted to the President for approval, together with the Council’s recommendation. Composition and operations of the Council are detailed in the Guidelines, as set forth in Exhibit A.

Process

The following steps shall be followed, in order:

- Before any Naming conversation initiated by the University occurs with a donor or honoree, approval by the appropriate Vice President, Dean, or Director shall be obtained
- The Naming will be presented to the Executive Vice President of the UF Foundation for consideration
- The Foundation will follow its normal vetting process for the Naming
- The Executive Vice President of the UF Foundation will consult with the President and the BOT Chair and Vice Chair
- The request will then be submitted to the Council
- The Council will review and, if recommended by the Council, submit the request to the President and BOT Chair for approval, with notice to the BOT Vice Chair
- Appropriate discussions may be held with the donor or honoree
- For BOT Namings, the request shall then be submitted to BOT for approval

Council Review

The Foundation Namings and Memorials Advisory Council shall review the following:

- All BOT Namings
- All Non-BOT Namings except those for which the President has delegated approval authority to the Executive Vice President of the Foundation (which shall be reported to the Council by the Council Chair)
- All Honorary Namings
- All proposed Memorials, whether in connection with a Naming or otherwise, including the requested wording (including quotations), size, material, design, method of attachment, and identified source of funds for maintenance. Approval of Memorials is at the discretion of the University. The Council may, if it determines to do so, approve standard wording and plaques in advance.

Documentation

In order to document the donor’s acknowledgment of the provisions and requirements of this policy and all other BOT, University, and Foundation requirements applicable to

Namings, all gifts involving a Naming must have written documentation to evidence the terms and conditions for the Naming. This documentation may be in the form of a gift agreement or other writing, as determined by the Foundation.

7. Board Members; Board and University Employees

The restrictions in this section continue to apply until one year after the individual no longer has such status, unless expressly waived by BOT for a particular Naming. All other procedures set forth in this policy will be followed.

Honorary Namings

Honorary Namings (i.e. not associated with any gift) are not allowed for any active BOG board member or employee or University trustee or any active University employee or student.

Gift Namings

Gift Namings, when the individual whose name will be used is an active BOG board member or employee or University trustee or any active University employee or student may be approved on the following conditions:

- The gift with which the Naming is associated is based on a Naming opportunity and amount previously approved by the Foundation Executive Vice President
- The same Naming opportunity would be available to others
- The BOG or University affiliated person has not had an advantage because of early access to the list of Naming opportunities
- The Naming does not present a conflict or the appearance of a conflict for any reason

8. Naming Requirements

Minimum gift levels and other requirements and guidelines for Namings and Memorials, consistent with this policy, shall be established by the Foundation, subject to approvals by the President and BOT Chair, with notice to the BOT Vice Chair and the Foundation Namings and Memorials Advisory Council. These Guidelines are outlined in Exhibit A.

9. Removal of Name by University

A Naming may be removed if a donor fails to fulfill the gift commitment (including with respect to the timing of gift payments) made in connection with the Naming or, in extraordinary circumstances, where continued use of the name would be damaging to the reputation of the University or otherwise significantly detrimental. The decision to remove a Naming may be made with approvals of the President and BOT Chair, with notice to the BOT Vice Chair.

10. Change of Name at Donor or Honoree Request

Donor- or Honoree- requested changes to a Naming, due to such things as a change in name or status, will be considered on a case-by-case basis and the decision will be made with approvals of the President and BOT Chair, with notice to the BOT Vice Chair.

11. Effect on Existing Namings

Nothing contained in this policy shall be construed or applied in such a way as to limit or terminate a Naming that exists or has been approved prior to the Effective Date of this policy, except that the provisions in paragraphs 9 and 10 regarding change or removal of a name will apply to existing Namings and those approved after the effective date of this policy.

Exhibit A Guidelines

Duration

- Naming of a Facility, Outdoor Area, Site, or Space is presumed to be effective for fifty years or the useful life of the named area, whichever is less, other than an Entity Naming for a building which generally will be twenty years
- At the end of such time, the name will be removed, without the need for further approval or action
- Thereafter, the donor or honoree shall be recognized in an appropriate alternative manner
- If it is in the best interests of UF to repurpose or replace a named Facility, Outdoor Area, Site, or Space before the useful life or fifty years, BOT for BOT Namings and the President and BOT Chair, with notice to the BOT Vice Chair, for Non-BOT Namings.

Usage

- Official University publications and forms shall use the full approved name
- For administrative convenience and ease of communication in other circumstances a shorter version may be used

Foundation Namings and Memorials Advisory Council

The standing members are:

- President or designee
- Executive Vice President of the Foundation (Chair)
- Senior Vice President and Chief Academic Officer or designee
- Senior Vice President and Chief Operating Officer or designee
- Chair of the Deans and Directors Development Council
- Senior Associate Vice President/CDO of the Foundation
- Senior Associate Vice President/COO of the Foundation
- Vice presidents or other university representatives appropriate to the naming in an advisory capacity

Regular meetings will be scheduled quarterly and more often as needed.

Due Diligence

- The Foundation will obtain background reports on all individuals and entities before a Naming will be approved by the Executive Vice President of the Foundation
- The type of report will be based on the visibility and permanence of the Naming

Minimum Gift Requirements

- New Facilities generally require a gift of 20-50% of the private support for the Facility but not less than 15% of the total cost of the Facility, with a current gift of cash or cash-equivalent equal to at least such minimum threshold, payable over no more than five years with at least 20% of such minimum threshold paid in the first year (in any event prior to the name included on such Facility) and with the balance of the minimum threshold generally payable on a prorata basis for the remainder of the five years
- Existing Facilities generally require a gift of 20-50% of the replacement value of the Facility, with a current gift of cash or cash-equivalent equal to at least such minimum threshold payable over no more than five years with at least 20% of such minimum threshold paid in the first year (in any event prior to the Naming being on such Facility) and with the balance of the minimum threshold generally payable on a prorata basis for the remainder of the five years; a deferred gift may be made for the Naming of an existing Facility in appropriate circumstances
- Academic Unit or Program Namings may require a current endowed cash or cash-equivalent gift unrestricted to the unit or program or an appropriate deferred gift
- Specific Naming amounts for Facilities, Outdoor Areas, Programs, Academic Units, Sites, and Spaces will be determined annually by the Foundation with the college or unit, subject to approvals by the President and BOT Chair, with notice to the BOT Vice Chair
- Namings may be considered for non-cash gifts in appropriate circumstances; the gift must be accompanied by an appraisal and the Foundation reserves the right to obtain an additional appraisal
- Transformational projects and programs often involve complex gift structures and multiple sources of funding. These guidelines are intentionally flexible and may be adapted in order to accommodate more complicated gift and funding mechanisms to accomplish important University goals.

General Exceptions

- Exceptions to any of these Guidelines can be made with full BOT approval.