

Sam Houston State University
A Member of the Texas State University System

University Advancement Policy UA – 02

Naming Policy

1. Policy Statement

- a. Naming opportunities exist and are reserved to recognize the dedication, outstanding or meritorious contribution or accomplishment, and/or generosity of extraordinary individuals and entities whose support is valuable to the mission and programs at Sam Houston State University (SHSU). This policy will guide the President in establishing consistent definitions, minimum standards, and general procedures to guide staff and donors in discussing naming opportunities. The naming of property, programs, and academic positions at SHSU is an important responsibility. A naming should align with the purpose, strategic priorities, values, and mission of the institution.
- b. Namings are the prerogative and responsibility of The Texas State University System (TSUS) Board of Regents. The [TSUS Rules and Regulations](#), Chapter III, Section 9 govern naming initiatives for facilities, statues, and monuments, academic programs, and building plaques, including buildings and other geographic areas of SHSU or TSUS-owned or controlled property or for the erecting of statues or monuments, and required approvals. The [TSUS Rules and Regulations](#) maintain control over any possible inconsistencies in this Policy.

2. Application of policy

All SHSU administration, faculty, and staff

3. Definitions

- a. Gift. “Gift” means a voluntary, philanthropic, and irrevocable transfer of assets received from another without adequate consideration. A gift may be made through a number of vehicles, including but not limited to cash, securities, estate and/or trust proceeds, personal property or in-kind donations, and real property.
- b. Institution. “Institution” means Sam Houston State University.
- c. Naming. “Naming” means the conferral of an individual or entity’s name to a building, room, and/or geographic area on Institution or TSUS-owned or controlled property, statute, monument, public art, memorial project, endowed chair, academic program (such as colleges, schools, academic departments, academic and health centers, programs, institutes, and organized research units), or other initiative or property to honor the philanthropic and/or distinguished contributions of an individual or entity.

4. Procedures and Responsibilities

- a. Types of Naming
 - i. Gift-Related Naming

A gift-related naming occurs when a donor makes a substantial qualifying tax-deductible contribution to the institution or to the Sam Houston University Foundation (SHUF) and is recognized with a naming.
 - ii. Gift-Related Corporate Naming

A gift-related corporate naming is the naming of property, programs, or academic positions whereby a business entity, foundation, or organization makes a tax-deductible gift to the Institution or SHUF. A corporate naming requires an agreement between the corporation and the institution in accordance with [TSUS Rules and Regulations](#), Chapter III, Section 9.1. Physical signage reflecting any corporate or organizational naming may not include the entity's logo or other components of branding.

iii. Corporate Naming

A corporate naming involves the sponsorship by a corporation or business entity that seeks to purchase advertising and marketing exposure and is not considered a gift. A corporate naming requires an agreement with the corporation and the institution in accordance with [TSUS Rules and Regulations](#), Chapter 3 Section 9.1. Corporate naming rights will include a term limit.

iv. Honorific Naming

An honorific naming may be bestowed in recognition of the dedication or extraordinary meritorious service of a person without consideration of financial contributions. A person being recognized by an honorific naming must have exhibited values consistent with the mission and vision of the institution, must have an established relationship with the institution, and must have contributed measurably to the good of society.

b. Approval of Naming

For naming initiatives requiring approval of the TSUS Board of Regents, please reference [TSUS Rules and Regulations](#), Chapter 3 Section 9. The TSUS Board of Regents retains exclusive authority for the naming of buildings and other geographic areas on Institution or System-owned or controlled property, for the erecting of statues or monuments, and academic programs.

i. Honorific Namings

Honorific naming requests will be submitted to the Vice President for University Advancement for review and approval before being submitted to the President for approval and then to the TSUS Board of Regents for final approval.

ii. Buildings and Other Major Facilities

Requests for naming of buildings and other major components of academic, athletics, and arts facilities, such as stadiums, wings of buildings, large auditoriums, concert halls, and clinics, and prominent outdoor spaces, statues, monuments, and building plaques must follow the TSUS Rules and Regulations, Chapter 3 Section 9.1. The required approvals are the Vice President for University Advancement, Provost and Senior Vice President for Academic Affairs, and Dean of the corresponding school or college, or the Vice President for the administrative department, as applicable, and the President for submission to the TSUS Board of Regents for final approval. The criteria for a gift-related naming will consider the value, visibility, improvements, and marketability of the location, and will be based on a minimum donation of no less than 33% of the current value of the property, taking into consideration construction and/or renovation costs.

iii. Areas within Buildings and Other Major Facilities

1. Naming of areas within buildings and other major facilities such as, but not limited to, bricks, pavers, atria, specific rooms, lecture halls, laboratories, and workshops, require the approval by the President upon recommendation of the Vice President for University Advancement and Provost and Senior Vice President for Academic Affairs, and/or Dean of the corresponding school or college, as applicable. The process of creating naming thresholds for a new or existing building or space should be coordinated by the appropriate Vice President for administrative divisions in collaboration with the Vice President for University Advancement and the Chief Financial Officer and Senior Vice President for Operations.
 2. A gift-related naming will consider the value, visibility, improvements, and marketability of the location and will be based on the minimum donation of no less than the cost of the original construction, renovation cost, or current value of the area within the building and other major facilities.
- iv. Grounds, Outdoor Renovations, Gardens, Trees, and Benches
- Gifts related to the naming of grounds, outdoor renovations, gardens, trees, and benches require the approval by the President upon the recommendation of the Vice President for University Advancement in consultation with the Chief Financial Officer and Senior Vice President for Operations. A gift-related naming will consider the value, visibility, improvements, and marketability of the location and will be based on a minimum donation of no less than the original construction cost, renovation cost, or current value of the property.
- v. Streets
- The naming of all streets located on the campus of the institution or on a property owned by the institution must be approved by the Board of Regents. Prior to submission to the Board of Regents, approvals are required from the Chief Financial Officer and Senior Vice President for Operations and the President upon recommendation of the Vice President for University Advancement. The naming of a street is a rare occurrence for which there is not an established gift requirement.
- vi. Real Property
- Naming of real property must be approved by the Board of Regents. Prior to submission to the Board of Regents for final approval, approvals are required from the Chief Financial Officer and Senior Vice President for Operations and the President upon the recommendation of the Vice President for University Advancement. Real property given to the institution may be named in consideration of the gift of the donor's entire interest in the property.
- vii. Programs, Institutes, Centers, and Other Organizations
- Naming of programs, institutes, centers, and other entities must be approved by the Board of Regents. Prior to submission to the Board of Regents, approval is required by the President upon the recommendation of the Provost and Senior Vice President for Academic Affairs, the Dean of the respective school or college, and the Vice President for University Advancement, regardless of the cash value of the gift.
- viii. Colleges and Schools

Naming of colleges and schools will consider the value, visibility, improvements, and marketability of the college or school and must be approved by the Board of Regents. Prior to submission to the Board of Regents, approval of the President is required upon recommendation of the Provost and Senior Vice President for Academic Affairs, the Dean of the respective school or college, and the Vice President for University Advancement, prior to being submitted to the Board of Regents for final approval.

ix. Academic Positions

Naming of academic positions must be approved by the President upon recommendation of the Provost and Senior Vice President for Academic Affairs, Dean of the respective school or college, and the Vice President for University Advancement. A gift-related naming will consider the value and visibility of the position and will be based on a minimum donation of \$1,500,000 for endowed chairs, \$500,000 for endowed professorships, and \$250,000 for endowed faculty fellowships.

x. Graduate Fellowships

Graduate Fellowships must be approved by the President upon recommendation of the Provost and Senior Vice President for Academic Affairs, Dean of the respective school or college, and the Vice President for University Advancement. Graduate Fellowships will be based on a minimum donation of \$100,000.

xi. Endowments

Named endowed scholarships, or other named endowments, must be approved by the President upon the recommendation of the Provost and Senior Vice President for Academic Affairs, Dean of the respective school or college, and the Vice President for University Advancement. Named endowments will be based on a minimum donation of \$25,000.

xii. Miscellaneous Naming Opportunities

Naming opportunities that are not otherwise set forth in this policy must be approved by the President and Vice President for University Advancement, regardless of the cash value of the gift.

c. Approval Procedures

i. Prior Approval

Any discussions with a representative of an individual about an honorific naming requires the prior approval of the Vice President for University Advancement, Provost and Senior Vice President for Academic Affairs, and the President. All initial approaches to, or serious discussions with, a donor about a gift-related or corporate naming opportunity must have the prior approval of the Vice President for University Advancement and the President. The purpose of preliminary approval is to ensure that the contemplated naming is likely to be consistent with university goals and priorities, master plans, and with the terms of this Policy. The approval to proceed permits the approach or discussions to begin and a proposal to be prepared; approval to proceed does not assure approval of the completed proposal. The prospective donor or representative shall be informed that any naming is subject to approval by the President and the TSUS Board of Regents.

ii. Proposal Approval

A complete proposal includes a *dossier* that addresses and verifies all the applicable criteria in this policy, including:

1. a precise description of the facility or program to be named;
2. the exact name to be adopted;
3. the basis or reason for the naming, and why the proposed naming is appropriate to the facility or program;
4. a description of the due diligence that has been performed on an individual or entity for whom the facility or program is to be named, including legal review and criminal background check where appropriate;
5. the status of any existing relationship to SHSU;
6. for benefactor naming opportunities, an analysis by SHSU Advancement including consideration of the recognition value of associated gift in accordance with the SHSU gift acceptance policy, other contributions and activities of the donor, consistency with other naming opportunity amounts, and other factors covered under this policy;
7. approvals by the relevant department, school, and SHSU leadership (as appropriate); and
8. if the naming is for someone other than a donor, formal permission of that person, or their authorized representative.

In considering a naming proposal, the Vice President for University Advancement may seek additional information related to a benefactor naming opportunity, or the Provost and Senior Vice President for Academic Affairs if honorific, and the Vice President for University Advancement will decide whether to recommend approval or disapproval to the president.

After receiving the recommendation of the Vice President for University Advancement or Provost and Senior Vice President for Academic Affairs, the President may seek additional information, disapprove the recommendation, or approve the recommendation and, when appropriate, forward the recommendation to the TSUS Board of Regents for authorization. The TSUS Board of Regents will consider proposals according to its normal operating procedures.

d. Guidelines

i. Relationship

A gift-related naming opportunity requires that the gift amount must be reasonably related to the facility, place, position, or item being named, pursuant to the stated approval procedures.

ii. Determination of Current Value

For the purposes of this policy, the current value of buildings and other major facilities, and of donated real property, shall be determined by the Chief Financial Officer and Senior Vice President for Operations. In all other circumstances where current value is required to be determined under this policy, the determination shall be made by the institution through the Chief Financial Officer and Senior Vice President for Operations.

iii. Donor Recognition

The designation of a naming shall not be publicly announced until final approval has been obtained, as required under [TSUS Rules and Regulations](#), Chapter 3 Section 9 and this Policy. Further, a donor shall not be publicly recognized regarding a naming until the institution has received at least 33% of any gift related to the naming with the remainder to be received within five (5) years. Irrevocable planned gifts proceed as cash received. Revocable planned gifts will not receive naming rights until the gift is realized.

iv. Gifts of Monies, Securities, Real Estate, Personal Property, and Other Types of Gifts

The President has the authority to allow various types of gift arrangements other than monies, securities, real estate, and personal property to be gifted in consideration of a naming, in accordance with gift acceptance policies established by the Division of University Advancement. These arrangements may include, but are not limited to, charitable trusts, charitable gift annuities, bargain sales, life estate gifts, life insurance, irrevocable beneficiary designations, and gifts of less than the entire interest in a property. In the event a naming requires Board approval, the Board of Regents shall be informed of the manner in which the gift is intended to be made, and the Board shall determine whether it is in the best interest of the institution to accept or reject the gift.

v. Duration of a Naming:

A naming in recognition of a gift shall be for the life of the building, other facility, program, endowment, or item being named unless otherwise agreed to in the gift agreement.

vi. Corporate Namings:

A corporate naming must be in accordance with [TSUS Rules and Regulations](#), Chapter 3 Section 9.1, and the [Texas Education Code §51.923](#) and this policy. A corporate naming shall be for a specific period of time as outlined in the sponsorship agreement.

vii. Fundraising, Development Campaigns, and Marketing of Naming Opportunities:

All fundraising and development campaign efforts related to naming opportunities and the marketing of naming opportunities must be approved by President and the Vice President for University Advancement. The President is responsible for obtaining required approvals related to namings. The President may delegate responsibilities to the Vice President for University Advancement for coordination of fundraising and development campaign efforts to secure gifts related to naming opportunities.

viii. Revoking of Naming

1. SHSU may revoke and remove a naming if:

- a. The pledge or obligation as outlined in the written gift agreement is unfulfilled or written off. Because the financial requirement of a naming is 33% of the total gift, the university reserves the right to consult with the donor, where possible, to restructure the purpose of the funds, and an alternative suitable naming may be considered.
- b. SHSU determines that the individual, family, or entity no longer meets the mission and values of SHSU, or the continued use of

the name would compromise public trust and reflect adversely upon SHSU.

ix. Exceptions

The President reserves the power to grant a naming at his/her discretion and grant exceptions to SHSU policies regarding naming opportunities when it is in the best interest of the institution. For namings requiring the approval of the Board of Regents, the board must approve any exception regarding such naming opportunity.

1. If SHSU terminates naming rights for gift-based namings on any of these conditions, SHSU has the right to retain funds previously contributed for the naming. The revocation decision shall be made by the President based on the recommendation of the Vice President for University Advancement. The TSUS Board of Regents retains exclusive authority for the removal of names of buildings and other geographic areas on Component or System-owned or controlled property.

e. Delegation of Authority

The President delegates the Vice President for University Advancement the authority to review and recommend for approval all gift-related naming opportunities of \$1,000,000 or more prior to the solicitation of any prospective donor. No commitment regarding naming for such gifts shall be made to a donor or honoree prior to the appropriate approvals. Proposals shall be made in writing in accordance with the requirements of this policy and reviewed by the Vice President for University Advancement before being presented to a donor. A gift agreement stating the terms of the gift-related naming must be created by the Division of University Advancement, and fully executed by both the donor and approved representatives of the institution, and the appropriate SHUF representative, when applicable. The proposal and gift agreement shall be maintained by the Division of University Advancement in accordance with SHSU's [Records Retention Policy](#).

References:

[The Texas State University System Rules and Regulations](#)
Sam Houston State University [Records Retention Policy](#)
[Texas Education Code §51.923](#)

Forms and Tools:

All gift agreements and naming memos will be generated by the Division of University Advancement for appropriate approvals.

Reviewed by: Matthew C. Bethea, Vice President for University Advancement

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