

NAMING OPPORTUNITY POLICY

Approval Authority: Board of Governors

Established On: 2020-09-30

Amendments: 2022-10-04

Category: External Relations (Includes Advancement)

1.0 POLICY STATEMENT

This policy provides guidelines for naming physical spaces, assets and academic entities on behalf of the Northern Ontario School of Medicine University (NOSM University).

2.0 SCOPE

This policy guides the granting of named recognition at the NOSM University for the following assets:

- buildings, parts of buildings, facilities and common or green spaces.
- programs, departments, centres and institutes and other academic units.
- chairs, professorships, fellowships, lecture series, or other academic appointments or initiatives.
- student assistance funds including scholarships, bursaries, awards, and prizes; and,
- such other assets as the institution may see fit to name in order to recognize philanthropic donations or distinguished service.

Where a naming opportunity arises for NOSM University-occupied facilities (i.e., buildings not owned by NOSM University), NOSM University agrees to conduct such negotiations with prospective donors, consistent with the approved 'naming policies' of the related institution. Decisions involving the naming of programs, assets and spaces within the NOSM University-occupied facilities will be the responsibility of NOSM University.

3.0 PROCEDURES

All proposals of naming the institution's spaces and academic entities in recognition of distinction or benefaction will adhere to the following procedure:

- All proposed naming opportunities will be considered in collaboration with the Chief Advancement Officer and the Director of Communications and External Relations.
- The proposed name will be forwarded to the Chief Advancement Officer, who shall make a determination whether the proposed naming conforms to this policy.
- The Chief Advancement Officer will create, maintain and coordinate a university-wide inventory of approved naming opportunities and a matrix of naming levels.
- Proposals of naming for distinction or benefaction will also be forwarded to the

Office of the President.

- No commitment (verbal or written) shall be made by NOSM University or any member of the institution to any person for the naming of an asset without first obtaining the requisite approvals in accordance with this Policy.
- Once such approval has been granted, any naming in recognition of a donor will only take effect once a minimum of 50% of the donation has been received by the institution.

4.0 NAMING AUTHORITY

The Chief Advancement Officer and/or Director of Communications and External Relations and where applicable the President, Vice Chancellor, Dean and CEO (President) must be consulted prior to making any offer of named recognition.

All naming opportunities must follow this policy and the matrix of naming levels.

The Board of Governors has the authority to approve the naming of new or substantially renovated buildings, centres or institutes, in recognition of gifts of more than \$1 Million at the recommendation of the President, and the Chief Advancement Officer.

In the case of Academic assets, the President shall consult with the Senate and Provost prior to making any recommendation to the Board of Governors.

Honorific recognition through naming may also be extended to individuals who have made an exceptional personal contribution to the University or to society in general. In such cases, written proposals shall be submitted to the Chief Advancement Officer, who shall, following consultation with the President and/or the Executive Group, make a recommendation to the Board for final approval.

A report of all naming recognition shall be submitted to the Board of Governors on a regular basis or as requested.

5.0 CONTENTS OF NAMING PROPOSALS

5.1 Naming proposals shall be in writing and shall contain the following:

- 5.1.1 Naming opportunities will be subject to a donor agreement.
- 5.1.2 A clear description of the naming recommendation being proposed.
- 5.1.3 A clear indication of the importance of the naming to the University.
- 5.1.4 The proposed term (and rationale therefor) of the naming and its short and long-term implications, including a provision for the future renaming of the asset.
- 5.1.5 The appropriateness of the timing of the naming (where the naming is in recognition of a retired or deceased individual);

- 5.1.6 Other conditions, concerns, or impacts of the naming on the academic unit and/or the University,
- 5.1.7 A provision acknowledging that due diligence has been conducted; and
- 5.1.8 A provision incorporating the provisions of this Policy as an integral part of the proposal or agreement.

5.2 Naming Proposals associated with donors, in addition to the matters shall be approved by the relevant parties and contain:

- 5.2.1 A statement as to the nature and impact of the gift meriting named recognition and the expected schedule of payment.
- 5.2.2 The significance of the gift as it relates to the realization and/or success of the project/priority or to the enhancement of the project's/priority's usefulness to the University and
- 5.2.3 Where the naming is to be of a new unit or program, its relevance, sustainability, and impact on NOSM University's strategic priorities.

6.0 DUE DILIGENCE

The responsible individuals proposing the Naming opportunity shall conduct an appropriate due diligence to be reasonably assured that the person honoured by the naming is of sound reputation and that the naming complies with this Policy as well as other policies within the University. Legal services may be requested to assist NOSM University's Planning and Risk Management Unit with such due diligence from time to time.

Approval Authority, pursuant to this Policy, shall be satisfied that the obligation of due diligence has been fulfilled.

7.0 VISIBILITY

- 7.1 Visual identities for all named entities will be consistent with the institution's branding and wayfinding protocols as defined by the Communications and External Relations Unit.
- 7.2 The Chief Advancement Officer and the Director of Communications and External Relations will be consulted on all named space recognition signage.
- 7.3 All signage for recognition and naming purposes will remain visible at all times and

will not be covered by posters, flags, banners or any other marketing or publicity materials.

- 7.4 If the benefactor requests a change in naming, the responsibility of the costs to update the signage will fall to the donor.
- 7.5 External corporate logos will not be permitted on the University's recognition signage.

8.0 RENAMING

- 8.1 NOSM University maintains the ability to rename a named asset if a reputational challenge is identified and for other reasonable grounds.
- 8.2 Named recognition can be revoked or altered in the event that the agreed-upon philanthropic contribution is not received by NOSM University within the agreed upon schedule of payments set out in the gift agreement.
- 8.3 The revocation of an asset must be approved by the Board of Governors on the recommendation of the President.

9.0 CONFIDENTIALITY

Any discussions of a proposed naming, including naming proposals, shall be dealt with in the strictest of confidence by all parties involved in the process until the naming is publicly announced by the NOSM University.

10.0 RELATED DOCUMENTS

- Appendix A - Naming Opportunity Matrix Approvals & Term Limits.

AUTHORITIES AND OFFICERS

The following is a list of authorities and officers for this policy:

- a. Approving Authority: Board of Governors
- b. Responsible Officer: President
- c. Procedural Authority: Director, Communication & External Relations
- d. Procedural Officer: Chief Advancement Officer

Review and Revision History

Review Period: 3 years or as required

Date for Next Review: 2025-11

Appendix A – Naming Opportunity Matrix Approvals & Term Limits*Last Updated October 2022*

Naming Opportunity Matrix - Approvals

Value	Approval Level
\$1 to \$50,000	Chief Advancement Officer or Director of Communications & External Relations
\$50,001 to \$250,000	President, Vice-Chancellor Dean and CEO
\$250,001 to \$1,000,000	Executive Group
\$1,000,001+	Board of Governors

Term Limits

Value	Approval Level
\$1 to \$50,000	10 years
\$50,001 to \$250,000	20 years
\$250,001 to \$1,000,000	30 years
\$1,000,001+	In Perpetuity