

Charitable Naming Policy

This policy sets forth the criteria and procedures for the philanthropic naming of academic entities and physical entities of Butler University.

Definitions. For purposes of this policy the following definitions shall apply:

- **Academic Entity** refers to any position, department, school, program, college, center, institute, organization, unit, professorship, lectureship, or resource that may be named.
 - **Major:** refers to prominent and formally established academic units within the university, including schools and colleges. These units typically require approval by the Board of Trustees or the Indiana Commission for Higher Education. When in doubt, an academic unit should be considered major.
 - **Minor** refers to a permanently established academic unit which is not major. Examples include most departments, centers, institutes, clinics, laboratories (as organizations), divisions, and administrative and auxiliary units.
- **Physical Entity** refers to any existing or proposed university building, building addition or physical space (interior and exterior) involving university property not named prior to implementation of this policy.
 - **Major:** refers to any large, prominent, or frequently used university facility. Examples include large or well-known buildings (academic or otherwise); facilities that receive frequent public visits; prominent interior spaces (main atrium, entrance, auditorium, library, specific floors, playing surfaces); and prominent exterior spaces (streets, plazas, parks, quadrangles, open atriums). When in doubt, a facility should be considered major.
 - **Minor:** refers to any university facility to which this policy applies, and which is not major. Examples include small structures; facilities designed for service or infrequent public use; most interior spaces (classrooms, offices, lounges, laboratories' physical space, and workspaces).

Approval Process for Naming Entities

Major Entities: The Vice President for University Advancement will present potential naming opportunities for major academic or physical entities to the University President and Board of Trustees for formal approval.

Minor Entities: The Vice President for University Advancement will be notified of intentions to name academic or physical entities through standard gift agreement procedures. Their final approval will be signified by the signed execution of the agreement.

Naming Criteria and Stipulations

- The naming of any physical or academic entity in honor of a current or former university employee or affiliate requires presidential approval.
- In rare circumstances, the University Board of Trustees retains the authority and discretion

to name facilities or spaces without a contribution associated with individual or family recognition.

- All fundraising efforts conducted through a consortium of donors or crowdfunding initiatives for the purpose of honorary or memorial naming are subject to approval by the Vice President for University Advancement.
- The naming of any university entity should be approached with a consideration for its long-term impact and reflection on Butler University. The university will thoroughly evaluate all potential ramifications associated with a naming opportunity, including conducting reputational research on the donor through due diligence processes. The university reserves the right to decline any naming opportunity at its sole discretion.
- To avoid any potential perception of commercial influence or conflict of interest, the university will conduct due diligence before recommending the naming of an entity involving a corporation, corporate foundation, or organization.

Contribution Guidelines

The university offers the opportunity to recognize significant philanthropic support through the naming of academic entities and physical spaces. To ensure a mutually beneficial partnership, the following criteria must be met:

- **Minimum Gift Requirements:** Contributions must meet the established minimum thresholds as outlined in the accompanying tables. These thresholds vary based on the type of entity being named (academic or physical).
- **Formal Commitment:** A written and signed agreement, detailing the charitable commitment, is required from the donor.
- **Employer Matching Gifts:** Employer matching programs can contribute to reaching the naming minimum. However, the donor remains ultimately responsible for any outstanding pledge balance if matching funds are not received.
- **Fulfillment of Pledge:** The university reserves the right to remove the associated name if the minimum contribution is not fulfilled by the end of the designated pledge period.

Requests deviating from these standard guidelines will require formal review and approval by the Gift Policy Committee.

Minimum Gift Levels for Naming Recognition

The following gift amounts are suggested as guidelines - final naming amounts may vary according to scale or at the discretion of the University Board of Trustees.

ACADEMIC ENTITIES	
<p>Endowed funds established to support an academic entity with naming recognition attached should produce annual spendable amounts equal to, or greater than, 20% of the entity’s actual or anticipated annual operating budget.</p> <p>It is preferred that 75% of the total gift amount be placed in an endowment for the future benefit of that academic entity.</p>	

<p>School or College: Provides ongoing financial resources to sustain the educational programs, activities, research initiatives, and physical infrastructure of the school or college. This includes essential equipment, structures, and ongoing maintenance, ensuring the college has the necessary resources to fulfill its educational mission and goals.</p>	Minimum of \$20 million
<p>Department: supports a department at Butler University (occasionally these are termed “schools”, e.g., the School of Music), and could fund salaries for department chairs or directors, ensuring strong leadership; enhance student experiences through various programs and initiatives, fostering a richer educational environment; and elevate the caliber of teaching activities by supporting faculty development and curriculum improvement initiatives.</p>	Minimum of \$8 million
<p>Center or Hub: Examples include, but are not limited to, the Black Hub, Creative Writing Center, and the ONB Center for Business Excellence</p>	Beginning at \$5 million
<p>Dean: An endowed deanship supports an existing salary line, benefits, special programs, and initiatives of the dean of the college for which it is designated and provides discretionary funds for other expenses as appropriate. Administered by the University Provost.</p>	Beginning at \$5 million
<p>Professorship: An endowed professorship supports existing salary & benefits as well as to support research, teaching & scholarly development of the endowed professorship holder. Endowed professorships are awarded for three (3) year terms subject to renewal with approval from the dean and provost.</p> <p>New salary lines, and the associated gift amount required to endow that line, must be set and approved by the Provost and Vice President of Finance and Administration. The endowed gift amount required to create new faculty lines must be sufficient to cover the entire cost of the new line.</p>	Beginning at \$2 million
<p>Program or Series: Examples include, but are not limited to, Distinguished Speaker Series, Visiting Scholars Program, or JCA Signature Arts Series.</p>	Beginning at \$1 million
<p>Faculty Excellence Fund: An endowed faculty excellence fund provides support for leadership development, teaching excellence and research, and scholarly engagement for an outstanding faculty member selected by university leadership. Administered by the Dean of the College.</p>	Beginning at \$100,000
<p>Endowed Scholarship: A named endowed scholarship supports educational expenses of a current Butler student(s).</p>	Beginning at \$50,000
<p>Endowed Funds: A named endowed fund provides non-scholarship support to a university academic or athletic department, program, unit, etc.</p>	Beginning at \$50,000
<p>Current Use Fund: A named current use fund provides support to a university academic or athletic department, program, unit, etc. May also be</p>	Beginning at \$25,000

established as a scholarship fund. These funds are generally not invested and are meant to be spent down over a period.	
Annual Scholarship: A named annual scholarship provides budget-informing support to college or athletics. Contributions received in a given fiscal year will be awarded the next academic year.	Beginning at \$10,000
PHYSICAL ENTITIES	
Butler University strives to aligns physical space naming with gifts that support the new construction, current renovation, or future renovation of that named space.	
New Construction: to name a new building or an addition to an existing facility. Whenever possible, 10% of gift should be placed in an endowment to support ongoing operating and maintenance of the building.	A minimum of one-third of the total project cost, or an amount approved by the President and the Board of Trustees.
Renovation: for naming a renovated space of an existing facility.	A minimum of one-third of the total project cost or an amount approved by the Vice President of Advancement.
Existing Building: for naming an existing facility.	A minimum of one-third of the replacement value as determined by the Vice President of Finance and Administration.
Other minor spaces: Guideline naming amounts for classrooms, laboratories, lecture halls, lobbies, or similar physical spaces will vary according to scale.	Use of room, size, and prominence on campus will determine the value of the space.

University policy does not permit the naming of exterior finishes such as bricks, benches, landscape design, statues, or trees.

Recognition and Signage

- The university will provide appropriate signage to acknowledge naming gifts for physical entities. University Advancement will oversee and approve all signage for named spaces to ensure consistent aesthetics across campus. They will also coordinate any necessary campus-wide updates related to named spaces.
- The university reserves the right to allocate a portion of the gift towards the cost of recognition signage associated with the donor's contribution. Such allocation will be communicated transparently to the donor and will not exceed a reasonable percentage of the total gift amount. The university will ensure that the recognition signage reflects the donor's generosity appropriately and in line with university standards.
- In addition to the university-provided signage, units housed within the named space may, at their discretion, create and install "recognition signage" (e.g., framed biography of the donor) in consultation with University Advancement. For corporate gifts, signage will always comply with Butler University's co-branding guidelines.
- The university reserves all rights of publicity, advertising, and any use of the designated name for promotional, instructional, and advertising materials across all mediums. This

includes, but is not limited to, print, film, video, radio, internet, and any other form of communication yet to be developed.

- This policy prohibits external organizations from placing their own signage or markers on university property.

Gift Agreement Signatory Process

To finalize a gift agreement involving naming recognition, the designated space, the gift amount, and, if applicable, the donor's preferred wording for signage within established character limits should be documented.

- Agreements requiring Board of Trustees approval will be signed by the President of Butler University.
- Capital Naming and New Funds: Agreements establishing new capital funds with naming recognition will be signed by the Vice President of Finance and Administration.
- Agreements for named scholarships will be signed by the Vice President of Enrollment Management.

Naming Duration and Considerations

A benefactor's or honoree's name recognition on an academic or physical entity typically continues for as long as the entity serves its original purpose or function.

If a named space undergoes demolition, replacement, substantial renovation, or a significant change in purpose, the Vice President for University Advancement will re-evaluate the naming conditions based on the following guidelines:

- **Communication:** The university will make reasonable efforts to inform the original donors, honorees, or their families about any upcoming changes to the named space.
- **Perpetuation of Names:** While not obligated, the university may consider perpetuating the original name through equivalent naming opportunities (e.g., plaques in new facilities) unless a signed agreement specifies otherwise.
- **Term Naming:** Term naming opportunities will be subject to individual review and approval by the Gift Policy Committee.
- **Benefactor/Honoree Name Changes:** The university will consider requests from benefactors or honorees to change a designated name due to reasons like divorce or corporate mergers. If approved, the donor or honoree will be responsible for all costs associated with replacing signage and other related materials.

Revocation of Naming Rights

The university reserves the right to revoke the designated name from an academic entity or physical entity under the following circumstances, as determined by the University Board of Trustees in its reasonable discretion:

- If the donors fail to fulfill their financial commitment as outlined in the initial agreement.
- If the designated name is deemed to be in violation of the law.
- If the donors engage in actions of such severe moral turpitude that it generates negative publicity of a substantial nature and duration, potentially causing significant damage to

the university's reputation.

In the event of a name revocation, both parties agree to refrain from making public statements (written or oral) to the media regarding the university's exercise of this right.

Consequences of Revocation:

- Donations previously made by the donors will not be returned.
- Funds from the original gift may be used to cover necessary and customary expenses associated with renaming the entity.
- Funds already deposited in the designated fund may continue to be used for the originally intended purpose as outlined in the agreement.
- The donors are released from any remaining payment obligations under the initial agreement.

Arbitration

Any circumstances not addressed herein will be reviewed and decided at the discretion of the Vice President of University Advancement. This may include, but is not limited to, questions of non-philanthropic naming opportunities.