

Commemorative and Philanthropic Naming Policy

PURPOSE

The purposes of this Policy include:

1. Guidance for the Board of Trustees, officers, employees and other constituencies with respect to naming opportunities available in conjunction with gifts to the College; and
2. Guidance to prospective donors and their professional advisors when considering gifts to the College.

The College strives to ensure that gifts support the College's mission. This policy sets forth criteria for:

1. Establishing named funds for designated purposes in order to assess the overall benefit to the College and whether incorporating the name is and will continue to be a positive reflection on the College; and
2. Accepting gifts to establish certain funds such that the gifts are in amounts appropriate to carry out their specified use and administered in a manner appropriate for a tax-exempt educational institution.

SCOPE

This Policy applies to the entire College community, which is defined as including the Davenport campus (Palmer College Foundation, d/b/a Palmer College of Chiropractic) and Florida campus (Palmer College Foundation, Inc., d/b/a Palmer College of Chiropractic Florida) and any other person(s), groups, or organizations affiliated with any Palmer campus.

DEFINITIONS

For the purposes of this Policy, the following terms shall have the meanings specified below:

- > The term **“College”** refers to Palmer College of Chiropractic, including operations on the Davenport campus and Florida campus.

- > The term “**College community**” refers to all students, faculty, staff (including administration), and any other person(s), groups, or organizations affiliated with any Palmer campus.

ADMINISTRATIVE RULES

Naming Categories

The college has the following naming categories:

1. Facilities and Other Physical Property – New or Renovated

- a)** Buildings and building complexes
- b)** Major building components (e.g. wings, towers, etc.)
- c)** Interior building spaces, including but not limited to:
 - i.** Classrooms
 - ii.** Laboratories
 - iii.** Meeting rooms
 - iv.** Faculty and staff offices
 - v.** Lobbies and foyers
- d)** Developed outdoor spaces (e.g. athletic field)
- e)** Specific items (e.g. Torii)

2. Academic and Non-Academic Entities – Centers and Programs

- a)** Departments (e.g. Research)
- b)** Centers and Institutes (e.g. Palmer Women’s Institute)
- c)** Programs (e.g. Nutrition)
- d)** Specialized post graduate certification programs

3. Faculty Positions and Funds – Academic and Clinical

- a)** Deanship (Deans and Associates)
- b)** Chair (Endowed Academic/Clinical Chair or Distinguished Academic/Clinical Chair)
- c)** Academic/Clinical Excellence Fund

- d) Research Fund
- 4. Scholarships
 - a) Endowed
 - b) Gift (annual, non-endowed)
- 5. Other
 - a) Lectureship
 - b) Restricted Endowment (program or area)

Guidelines

Facilities may be named to honor:

1. Outstanding College service (faculty, administrators, and others);
2. Exemplary service to the greater community (public officials, scientists, humanists);
3. Distinguished alumni; and
4. Donors

Unless a decision is made to name a new facility in honor of someone, a generic or descriptive name shall be assigned initially, e.g., Athletic Fields.

Upon recommendation of the GAC and with the approval of the Chancellor, plaques or tablets may be installed in buildings in recognition of distinguished members of the College faculty or staff whose services were identified with the functions of those buildings.

Persons with records of honorable and long service to the College, a campus, or a department may be recognized by the naming of auditoria, reading rooms, laboratories, observatories, lounges, theaters, conference rooms, walks, gardens, plazas, quadrangles, and similar interior and exterior spaces. The College may solicit suitable donations from the advocates of such recognition, particularly if the request for naming comes from other than a family member of the honoree.

Commemorative Naming (as opposed to philanthropic naming)

Facilities and programs may be named for an individual who has provided exemplary, meritorious or philanthropic support or service to the College. When a naming opportunity is presented, strong preference shall be given to persons who have had long, close, and valued associations with the College such as professors, administrators, volunteers, or distinguished and supportive alumni, and always in consideration of opportunities to acknowledge future donors.

Once a building or a program has been named, the name shall not be changed unless there are unusual or compelling reasons for changing the name.

Exceptions to this policy may be made only by the Chancellor of Palmer College with final approval from the Board of Trustees.

Duration of Names on Buildings and Spaces

Naming is considered permanent until or unless a facility is demolished, substantially renovated or expanded, or an academic unit or other program is discontinued.

FACILITIES

In the event of demolition or renovation of major facilities (intentionally, through accident or act of nature), existing names will not automatically be transferred to a new or renovated facility. In such cases, the College reserves the right to assign a name to the new or renovated facility by:

1. Transferring the existing name to the new or renovated facility (usually a prominent or historically significant name that the College wishes to continue to honor); or
2. Asking the previous donor to make a new naming gift. If the donor declines, the College may offer the naming opportunity to a new donor. It may be appropriate to name part of the new building for the previous donor or to include a plaque to indicate that the new facility occupies the site of a building previously known by another name.

ACADEMIC UNIT OR OTHER PROGRAM

If a department, center, institute, program, or other unit is discontinued, the College will consider alternative recognition, especially where the naming is supported by an

endowment gift. Appropriate recognition will be determined by the redesigned use of the endowment fund.

Changing Names and Re-Naming or Removing Names from Building, Spaces and Programs

In the case of naming opportunities, the College reserves the right to re-name its buildings, facilities and programs, in the event of unusual or compelling circumstances, at all times.

In matters of corporate names, the College will work with the corporation to ensure that any change to the corporation's name is considered by the College. Similarly, for individual name changes, the College will work with the individual to appropriately address changes in name in a manner that is appropriate for the donor and the College.

Any costs related to changing physical signage as a result of a corporate name change shall be at the expense of the corporation requesting the name and not the College.

In unusual or unforeseen circumstances, the College reserves the right to remove a previously approved name. The Chancellor of the College will bring forth the recommendation for approval by the Board of Trustees. Examples of such situations include, but are not limited to:

1. Donor does not fulfill a commitment upon which the naming was approved.
2. Continuation of the name may compromise the public trust or reputation of the College.

The College, in the sole and absolute discretion of its Board of Trustees, may exercise this option if a designated name, in its judgment, should bring discredit upon the College. In the event of such re-naming, the College shall have no financial responsibility, despite anything that may be stated or implied to the contrary.

Naming of a Building or Similar Facility or Space Not within a Building (such as an athletic field or street)

The following process will be applied in the naming (for individuals, corporations, or foundations) of campus buildings, grounds, and thoroughfares.

STEPS FOR NAMING A BUILDING OR SPACE NOT WITHIN A BUILDING

The Board of Trustees Building and Room Naming Policy requires the presentation of any proposed commemorative naming of a building or similar facility or space not within a

building (such as an athletic field or street) to the Board of Trustees prior to any such action and prior to the presentation of a proposal for such naming is made to a person or persons external to the College.

Thus, before a proposal is presented to a person or persons external to the College, the proposal shall be presented to the GAC. The GAC shall determine whether the proposal should move forward. If so, the proposal shall be referred to the Executive Administrative Team (EAT) with a request that the EAT make a recommendation as to the suitability thereof.

The EAT shall discuss proposed name or names and determine whether the proposal is appropriate or inappropriate for the purpose intended and shall state the reasons for its recommendation.

Names for new or existing buildings and structures or spaces not within a building (such as an athletic field or street) shall be forwarded to the Board of Trustees for final approval.

It may not be possible in all cases to present a proposal for naming of a building or similar facility or space not within a building to the Board of Trustees prior to presenting a proposal to a person external to the College. For example, naming proposals may originate with the prospective donor, or may arise as a result of a bequest or other estate gift. In such instances, before the gift is accepted, this proposal will be presented to the Board of Trustees following the process outlined above. If the Trustees do not approve the proposed naming opportunity, such a gift may be declined by the College.

Naming of Funds

It is the policy of the College to approve the establishment of funds for certain purposes on the receipt of gifts or commitments which meet the prescribed requirements.

Gifts that establish endowments require the use of the College's Standard Gift Agreement. The use of funds may be specified for purposes such as professorships, fellowships, scholarships, books, teaching, research, or a particular aspect of student life provided the donor submits his or her intentions in writing to the College. Each department may suggest special activities, programs, research, lectures, etc., that can be supported by varying amounts of funding. The Board of Trustees has the power, in the absence of written instructions from the donor, to designate funds as quasi-endowment, or for use in other purposes.

A gift or bequest may specify that the funds are either expendable or endowed. In addition, expendable or endowed gifts may be designated as restricted or unrestricted. See below for unacceptable restrictions. If restricted, written instruction from the donor is required. Unrestricted bequests and gifts will be administered in accordance with the College's Endowment Policy.

Gifts for either current use or endowment purposes given directly to the College will be received and expended or invested by the College. Gifts for endowment or capital purposes must be specifically designated as such in writing by the donor. For gifts not specifically designated as endowed, the College may, at its discretion, create an endowment that honors the spirit of the donor intent.

The establishment of a named endowment fund requires a gift with a specified minimum amount. Minimums for named endowment funds are detailed below. The Vice Chancellor for Advancement, in consultation with the GAC, is empowered to specify required minimum gifts for establishing other endowments. A named endowment fund may be created, even though the principal amount may not have reached the required minimum, if the donor agrees in writing to complete the endowment within a specified period of time, usually three to five years.

A gift or bequest for endowment less than the minimum at the end of the payment period specified in the gift agreement may be added to another endowment fund that pertains to the donor's desired intent, if an inadequate funding clause was not included in the original gift agreement. In cases where no agreement exists, the Advancement Office will establish an agreement with the donor, or will otherwise work with the donor or his/her representative to properly allocate the gift.

Funds may be established for the purposes as outlined below.

Gift Restrictions

No gift which by its nature or acceptance is prohibited by federal or state laws will be accepted. Restrictions based on age, color, disability, gender identity, marital status, national or ethnic origin, political affiliation, race, religion, sex (including pregnancy), sexual orientation, veteran status, and family and genetic information are unacceptable in any gift to the College. If the College is asked to accept a gift, which is inconsistent with the above restrictions yet is consistent with the College's goal of achieving a diverse student body, approval of the GAC, and of Legal Counsel must be secured.

Whenever possible, any restrictions related to the use or purpose of a gift should be written as "preferences" to allow the College the greatest latitude in ensuring future use. When that is not

possible, it is desirable to reserve the authority of the Board of Trustees to change the use or purpose of the gift as may be called for by changed circumstances.

Unless waived by the Vice Chancellor for Advancement, gift agreements concerning gifts of endowment must include the standard clause regarding frustration of purpose/changed circumstances.

If a designation or account of a contribution needs to be changed at a later date, Advancement Services requires written approval from the donor and the Vice Chancellor for Advancement, with guidance from the GAC.

RESTRICTIONS INVOLVING STUDENT FINANCIAL AID

In addition to the general restrictions noted above, the following restrictions are unacceptable in gifts given for financial aid purposes:

1. Restrictions permitting designation of an individual recipient by the donor;
2. Restrictions to relatives or descendants of the donor as recipients;
3. Restrictions by the donor on interest rates and conditions for repayment of loans.
(Rates of interest or repayment requirements should be determined by College policy and practice at the time of the loan.)

Corporate (or Brand) Naming

Corporations and other business may make gifts and be offered a naming opportunity. No naming opportunity shall be offered by the College in exchange for any expectation of exclusivity of marketing any product or service. No naming opportunity shall be offered by the College in exchange for an agreement to change curriculum that would otherwise not be changed.

Consideration shall be given by the GAC and Board of Trustees to any appearance of exclusivity or endorsement by the College of any brand, corporation or other business the name of which is proposed for an endowment, space, or facility on any campus. Similarly, consideration shall be given to potential opportunity loss of other potential donors, and effect on public perception, of any proposed corporate naming opportunity.

Types of Endowments and Minimums

DEANSHIP

A named endowed fund to honor the achievement, expertise and seniority of the Dean or Associate Dean and provide salary support, with a gift of not less than:

Dean - \$2,000,000

Associate Dean - \$1,000,000

ENDOWED ACADEMIC/CLINICAL CHAIR AND DISTINGUISHED ACADEMIC/CLINICAL CHAIR FUNDS

A named endowed fund to honor the achievement, expertise and seniority of faculty and provide salary support, with a gift of not less than:

Endowed - \$1,000,000

Distinguished - \$1,500,000

ACADEMIC/CLINICAL EXCELLENCE FUND

A named endowed fund to provide support to the work of faculty member(s) in a department, program, institute or center for academic purposes may be established with a gift of not less than:

\$500,000

NAMED RESEARCH FUND

A named endowed fund to provide support for academic or research projects may be established with a gift of not less than:

\$100,000

ENDOWED SCHOLARSHIP

A named endowed fund for the purpose of supporting tuition, fees and expenses for a student may be established with a gift of not less than:

\$25,000

GIFT SCHOLARSHIP (ANNUAL NON-ENDOWED)

A named endowed fund for the purpose of supporting tuition, fees and expenses for a student may be established with a gift of not less than

\$1,000

LECTURESHIP

A named endowed fund to provide a lecture program (i.e., one that may be used for the honorarium and expenses of a special guest lecturer) for a department or program may be established with a gift of not less than:

\$25,000

RESTRICTED ENDOWMENTS (RESTRICTED TO A PROGRAM OR AREA FOR UNRESTRICTED USE)

A named endowed fund without additional restrictions to support needs in a department or program as determined by the GAC in consultation, as necessary, with the Provost or other EAT leadership, may be established with a gift of not less than:

\$10,000

OVERSIGHT

The Palmer College Gift Acceptance Committee (GAC) oversees administration of this Policy. This Committee is comprised of the Chancellor/CEO, the Vice Chancellor for Advancement, and the Vice Chancellor for Finance and Administration. The GAC will consult with, and convene when necessary, members of the Executive Administrative Team (EAT) to consider proposed naming opportunities.

The Vice Chancellor for Advancement, in consultation with the GAC, shall provide procedures for administering this policy.

AMENDMENT OF THIS POLICY

Any exceptions or changes to this Institutional Policy shall be presented first to the Vice Chancellor for Advancement, who will bring the exception or change to the GAC and the EAT, as necessary, for approval or amendment.

AUTHORIZATION

This Institutional Policy is authorized by the Board of Trustees of Palmer College Building and Room Naming Policy Number BO400, dated June 4, 2005, as amended from time to time.

STANDARD INSTITUTIONAL POLICY PROVISIONS

Institutional policies are supplemented by provisions that are applicable to all institutional policies. It is the responsibility of all employees and students to know and comply with these standards.

- > [Standard Provisions Applicable to All Institutional Policies](#)

Additional Information

ASSOCIATED POLICIES, PROCESSES AND/OR PROCEDURES

This Policy is supplemented below. It is the responsibility of all employees and students to know and comply with policies and procedures as supplemented.

POLICIES

- > Board of Trustees – Policy [BO400 Building and Room Naming](#)

PROCESSES AND/OR PROCEDURES

- > N/A

FORMS/INSTRUCTIONS

- > N/A

OTHER RELATED INFORMATION

- > N/A

CONTACTS

Barbara Melbourne, J.D.
Vice Chancellor for Advancement
Palmer College of Chiropractic
1000 Brady Street
Davenport, Iowa
Phone: (563) 884-5290
Fax: (563) 884-5585
barbara.melbourne@palmer.edu

HISTORY

Adopted:..... December 12, 2018

Responsible Officer:..... Barbara Melbourne, J.D.
Vice Chancellor for Advancement
Palmer College of Chiropractic
1000 Brady Street
Davenport, Iowa
Phone: (563) 884-5290
Fax: (563) 884-5585
barbara.melbourne@palmer.edu

Issuing Office..... Office of Compliance
Earlye Julien, PHR, M.S. Ed., CQIA
Senior Director for Compliance
Palmer College of Chiropractic
1000 Brady Street
Davenport, Iowa
Phone: (563) 884-5476
Fax: (563) 884-5883
earlye.julien@palmer.edu