

Policy Relating to the Naming of University Assets

Last revised by:

Executive Committee

September 4, 2014

Minute 6

Full history appears at the end of this document.

SECTION 1 - PREAMBLE

- 1.1 It is a long-standing and honorable university custom to name existing and proposed tangible and non-tangible assets after the names of founders, benefactors, governors, members of staff and others who have made exceptional contributions to the institution and its mission or to the broader local, national or international community.
- 1.2 Naming provides meaningful opportunities for the recognition of outstanding contributions by those who serve as inspiration for future generations of students, graduates, and members of the University community. Further, by recognizing exceptional contribution to the institution or to the community, the association with such extraordinary individuals strengthens the institution and its sense of heritage and connection to the community. The ceremonies held to mark such recognition represent significant events in an institution's history.
- 1.3 The naming of an institution's "asset" is of considerable significance to an institution for several reasons:
 - a) The choice of persons selected for such recognition reflects how an institution perceives itself, its mission and its values;
 - b) The institutional assets available for naming are limited while the number of individuals who could potentially be honored by a naming is much greater – the limited number of naming opportunities must therefore be used judiciously;
 - c) Names are usually attached to a particular asset in perpetuity or for the life of the asset; and,
 - d) Care must be taken to ensure consistency in the tribute paid by the University to its staff, benefactors and other meritorious persons.
- 1.4 This Policy has been adopted as a means of ensuring that the above reasons, and the process and principles that guide the naming of University assets are clearly articulated, understood and uniformly applied by all those involved.
- 1.5 As of the date of its approval by the Board of Governors, this Policy shall be included **by reference into and deemed** to be part of any Naming Proposal and Memorandum of Agreement, hereafter provided for.

SECTION 2 – NAMING OPPORTUNITIES – SCOPE OF POLICY

2.1 This Policy applies to the naming of all University assets, tangible and non-tangible, whether existing or proposed, which include:

Tangible Assets:

- a) buildings and parts thereof (e.g., wings, lecture and seminar rooms, laboratories, reading rooms, atria, foyers, etc);
- b) collections of books, archives, art and other documentary and/or cultural materials;
- c) equipment;
- d) open spaces, gardens, roads, fields, etc.; and,
- e) other natural features or physical improvements.

Non-Tangible Assets:

- f) academic units (e.g., faculties, departments, schools, institutes, centres, libraries, etc.)
- g) academic programs within one or more academic units;
- h) endowed chairs;
- i) lectureships, fellowships, professorships, scholarships;
- j) funds to support or recognize graduate and undergraduate students;
- k) administrative posts (deanships, chairs, directorships, etc.);
- l) events both academic (e.g., lectures, symposia, conferences, etc.) and non-academic (e.g., athletic and other extracurricular events) and;
- m) student services and other services.

NOTE: *This list does not purport to be an exhaustive statement of all assets that may exist from time to time within the University.*

SECTION 3 - PRINCIPLES

3.1 The naming of University assets must conform to the following principles:

- a) Each naming shall enhance the mission and priorities of the University while preserving the University's integrity and academic freedom;
- b) Naming of academic units and programs shall not impede the University from altering its academic and research priorities and shall conform to all University policies and guidelines governing the establishment of such assets;
- c) Buildings and academic units and programs shall be named only after individuals;
- d) Individuals must be of sound reputation;
- e) Naming of University tangible assets in recognition of a corporation, foundation or other similar entity shall be for a defined and limited period of time; no building shall so be named;
- f) Naming of University assets shall comply with the standards for each level of naming opportunity or particular assets as specified from time to time by the University;
- g) No commitment (verbal or written) shall be made by a member of the University community to any person for the naming of any University asset without the prior written approval of the Principal;

- h) Commemorative naming of a tangible University asset in honour of a member of the University community shall not be conferred until two years following the member's retirement or death;
- i) Naming in recognition of a benefactor will only take effect once a significant portion of the donation has been received.

SECTION 4 – NAMING AUTHORITY

- 4.1 Authority for the approval of the naming or renaming of University assets is vested in the Board of Governors. Section VII of this Policy outlines the consultative process required for naming University assets.
- 4.2 However, with the exception of the authority to name academic units and programs, and buildings and other significant tangible assets the Board of Governors delegates its authority to name University assets to the Principal, with due respect to the consultative process outlined in Section VII. The Principal shall report annually to the Board of Governors on the exercise of his or her authority.

SECTION 5 – DUE DILIGENCE

- 5.1 Any naming is contingent on fulfillment of the obligation of due diligence by the individuals responsible for recommending and approving a naming.

SECTION 6 – CONFIDENTIALITY

- 6.1 All Naming Proposals, whether to honour a benefactor or non-benefactor, shall be dealt with in the strictest of confidence by all involved in the process until the naming is publicly announced by the University.

SECTION 7 – PROCESS

- 7.1 Naming recommendations may originate from any member of the McGill community. Members shall forward their recommendation in writing to one among the following individuals, in accordance with the overall and general responsibility for the asset in question: a Dean, the Director or Dean of Libraries, the Provost, the Deputy Provost, an Associate Provost, a Vice-Principal, or the Secretary-General.
- 7.2.1 The Dean, Director or Dean of Libraries, Provost, Deputy Provost, Associate Provost, Vice-Principal, or Secretary-General, as the case may be, will evaluate the proposed naming and, if it is deemed worthy of further action, seek the written opinion of the Provost, the Vice-Principal (University Advancement), and the Vice-Principal (Administration and Finance) on the merits of pursuing the proposal.
- 7.2.2 Once these opinions have been received, the Dean, Director or Dean of Libraries, Provost, Deputy Provost, Associate Provost, Vice-Principal, or the Secretary-General, as the case may be, shall develop a written Naming Proposal supporting the case for the naming and make a recommendation to the Principal. Naming Proposals shall incorporate the principles set out in Section III (Principles) and be prepared in accordance with Section VIII (Contents of Naming Proposals) of this Policy. This proposal will include the opinions of the Provost, the Vice-Principal (University Advancement), and the Vice-Principal (Administration and Finance) though it is not required that the opinions be unanimously supportive.
- 7.3 The Principal, once satisfied that the Naming Proposal conforms to this Policy and that the recommendation is deserving of support, may, subject to the following paragraph, grant her or his approval to the naming.

- 7.4 In the case of the naming of an academic unit or program, or buildings or other significant tangible assets, the Principal shall consult with an ad hoc committee composed of members of the Board of Governors, the Senate, and the University community, all of whom shall be designated by the Principal. Following such consultation the Principal may recommend approval of the Naming Proposal to the Board of Governors or its Executive Committee.

SECTION 8 – CONTENTS OF NAMING PROPOSALS

8.1 Naming Proposals shall be in writing and contain the following:

- a) a clear description of the naming recommendation being proposed;
- b) a summary of the life, career and meritorious activity of the person to be recognized to ensure consistency with the objectives of this Policy;
- c) a clear indication of the importance of the naming to the University;
- d) the proposed duration of the naming and its short and long term implications;
- e) the implications of the particular Naming Proposal for other naming opportunities associated with the asset where relevant; taking into account the priorities of the particular program, in the context of the mission and priorities of the University;
- f) provision for the future renaming of the asset especially where the asset may be eventually replaced or substantially altered in its form, nature or use;
- g) the level of support for the proposal within the unit involved, where relevant;
- h) the appropriateness of the timing of the naming (where the naming is in recognition of a retired or deceased individual);
- i) other particular conditions, concerns, or impacts of the naming on the academic unit and/or the University; and,
- j) a provision incorporating the provisions of this Policy as an integral part of the proposal or agreement.

8.2 Naming Proposals associated with benefactors, in addition to the matters referred to under the preceding paragraph, shall be signed by the relevant parties and also contain:

- a) a statement as to the nature and impact of the gift meriting named recognition;
- b) 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/priorities usefulness to the University;
- c) a statement of the gift, the expected schedule of payment;
- d) where the naming is to be of a new unit or program, its relevance, sustainability and impact on the University's or faculty's strategic priorities;
- e) the period of the naming where the person being recognized is a corporation, foundation or other similar entity; and,
- f) a provision dealing with the contingency that the gift is not received in accordance with the terms agreed to.

SECTION 9 – RENAMING OF UNIVERSITY ASSETS

- 9.1 A naming will normally be for the useful life of an asset. If an asset must be replaced or substantially altered in its form, nature or use, the University reserves the right to rename the asset. However, recognition of earlier donors and honourees shall be included where appropriate.
- 9.2 Where a naming is for a limited period of time the University reserves the right to rename the asset on the expiration of that time.
- 9.3 A proposal to rename an asset or to add a second name shall adhere to the same procedures and criteria for naming set out above.
- 9.4 When an asset is proposed for renaming, reasonable efforts will be made to inform the original honouree or benefactor in advance. If the honouree or benefactor is deceased, reasonable efforts will be made to inform the next generation of family members in advance of the renaming.

SECTION 10 – TERMINATION OR REVOCATION OF NAMING

- 10.1 No commitment to a naming shall extend beyond the life or existence of the asset named.
- 10.2 Moreover, the University shall retain the discretion to revoke a naming where, in the opinion of the Board of Governors, retention of the name would be prejudicial to the University's reputation. Authority to revoke a naming is vested in the Board of Governors and shall be contingent on fulfillment of the obligation of due diligence by the individuals responsible for recommending the revocation of a naming.

SECTION 11 – PLAQUES AND SIGNS RECOGNIZING NAMING

- 11.1 Plaques and other signs recognizing a naming shall be of generally uniform design and contain the name of the honouree and the date of dedication or, as appropriate, the date on which the project was substantially completed.
- 11.2 All plaques and signs are subject to University policies and guidelines applicable to signage.

SECTION 12 – RECORDS

- 12.1 Once final approval of the naming has been granted and the naming has been publicly announced, a copy of the Naming Proposal, Memorandum of Agreement, deed of donation, record of approval and other relevant documents shall be deposited with the Secretariat.
- 12.2 The University Advancement Office shall also keep a complete record of all Naming Agreements and related documents.
- 12.3 The Office of Campus and Space Planning shall be responsible for maintaining and updating an inventory of named assets.

SECTION 13 – LEGAL REVIEW

13.1 Legal Services of the University shall review Naming Proposals, Memorandum of Agreement, deeds of donation and other relevant documents relating to:

- a) Naming in recognition of a benefactor
- b) Changes to any naming

<i>History:</i>		
Senate	April 19, 2006	Minute 15
Executive Committee	May 1, 2006	Minute 3
<i>Amendments:</i>		
Executive Committee	December 14, 2010	Minute 6
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Offices responsible for developing and maintaining this policy:	Secretariat	
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