



DRAFT

Donor Recognition and Naming Policy

Area Responsible for Administration:	Director of Development
Approval Authorities:	Executive Director and Board of Trustees as appropriate
Approval Date:	
Review Timeline:	Every 5 Years

1. Policy Statement

The purpose of this policy is to define the process that governs the recognition of donors of The Schiele Museum, including protocols for determining permanent recognition through the naming of Museum activities, programs, spaces, or other assets. The policy formalizes donor recognition in order to provide:

- appropriate public recognition and consistent institutional appreciation of major donors;
- public evidence of philanthropic activity that demonstrates that the Museum enjoys considerable external support and encourages others to invest in the Museum's future;
- appropriate utilization of the limited number of naming opportunities;
- clear guidelines for those involved in discussions with donors;
- facilitation of increased and ongoing support from existing supporters.

2. Responsibilities

2.1 The Executive Director and the Director of Development, and the Board of Trustees as appropriate, shall be responsible for naming and recognition with regard to physical spaces at The Schiele.

2.2 The Development department shall be responsible for:

- Other naming opportunities as per the terms of relevant gift agreements
- Developing and managing the inventory of naming opportunities
- Liaising with donors and prospects
- Managing all associated paperwork and formal agreements
- Ongoing stewardship of donors and naming.

3. General Guiding Principles

3.1 Naming opportunities at The Schiele are designed to thank and recognize donors for their financial support and commitment to The Schiele. Under exceptional circumstances, and with the approval of the Executive Director, namings may be conferred to recognize

and celebrate exemplary service, voluntary contributions, special events, anniversaries or other significant initiatives.

3.2 In general, high profile, high traffic areas shall be named to ensure that the naming is experienced by a maximum number of people.

3.3 The Schiele shall consider naming the following assets:

- Significant physical infrastructure, including classrooms, lobbies and/or common areas, buildings and rooms
- External spaces and infrastructure, such as parking areas, gardens, trees, benches and seating
- Physical and digital assets, such as collection of artifacts
- Any other such entities approved in accordance with this policy.

3.4 All naming opportunities shall be subject to a written naming agreement, which may be a clause within a gift agreement, to be signed by the donor or their representative and a nominated representative from The Schiele.

3.5 A naming agreement shall detail the specific asset to be named, the agreed time period for naming, the actual agreed name for the asset and details of signage relating to the asset.

4. Philanthropic Guiding Principles

4.1 A naming opportunity is a symbolic gesture of thanks and recognition and does not have to reflect the designation of the donation itself.

4.2 The Schiele may only name a specific facility (e.g. building or room) in recognition of donations of \$25,000 or greater. For amounts less than \$25,000, The Schiele may name smaller items (e.g. seats, stones, trees or benches) under the guidance of the Development department.

4.3 The Schiele may, under the guidance of the Executive Director, recognize a group of donors as a collective who individually donate less than \$25,000, but together donate \$25,000 or greater.

4.4 The Schiele may name a facility for a donation paid through a multi-year pledge as long as 25% of the total donation is paid prior to the facility being named.

5. Ethical Principles

5.1 As part of this process, due consideration will be given to the reputational risk of a naming opportunity. The Executive Director shall evaluate potential reputational risks and opportunities before preliminary discussions begin with a donor or prospect to ensure The Schiele's reputation is upheld.

5.2 Every naming agreement shall be subject to ongoing ethical evaluation, and The Schiele reserves the right to withhold or reverse any naming opportunity should the donor's ethical integrity be called into question. The Executive Director retains the right to reverse all agreements made if the ethics of the honoree cease to align with The Schiele's.

5.3 The naming of a facility, academic program or position is for recognition of an honoree only and does not imply any influence of the honoree on the use of or material design of the facility.

However, The Schiele will report back to donors on the impact of their donation and the use of the named facility.

6. Inventory and Allocation

6.1 The Development department shall manage the inventory of naming opportunities. However, consideration can be given to any space, facility or other asset that is identified by a donor or employee. The Executive Director shall evaluate and approve any naming opportunities that are not in the existing inventory prior to being offered to a donor or prospect.

6.2 A donor or prospect may be offered a single naming opportunity or several options to choose from as determined by the donor or prospect relationship manager and the Development department.

6.3 The Schiele shall consider the following criteria when calculating the valuation of a naming opportunity:

- Market conditions
- Campaign goal and/or project cost
- Location and/or visibility
- Size of space
- Relevance to The Schiele's mission.

7. Duration of Naming

7.1 Unless otherwise agreed upon, a naming opportunity related to a physical facility shall be offered for a period of at least 10 years. If a facility is considered obsolete and/or replaced prior to the end of the 10-year minimum period, The Schiele shall either transfer the donor's name to a comparable facility for at least the remainder of the period or negotiate another mutually satisfactory agreement.

7.2 The Development department, and the Executive Director where appropriate, shall determine other assets to be assigned on an ad hoc basis.

7.3 At the end of a period of named recognition, The Schiele shall offer the donor first naming prior to offering it to other donors or prospects.

7.4 Any assets already named at the start date of this policy shall be grandfathered under the terms of this policy. Where necessary, The Schiele shall contact the honoree and issue a new written agreement that aligns with this policy. Where not possible, the terms of this policy will inform the new agreement.

7.5 No facility shall be named in perpetuity, however, The Schiele shall honor such commitments made in historical agreements as long as the facility continues to exist.

8. Signage

8.1 All associated signage for a named facility must conform to The Schiele's signage protocol for that specific facility. This policy must also be consulted prior to the approval of any naming and, where a naming does not conform to its terms, The Schiele shall provide alternative options to the donor, prospect or honoree.

8.2 The cost of signage associated with a naming will be included, where possible, in the capital budget for a build or renovation. Where not possible, the costs will be met by The Schiele's stewardship and recognition or marketing budget.

8.3 Recognition expenses must not exceed two per cent of the value of the gift, including event and signage costs.

9. Changes to Naming

9.1 Over the duration of a naming opportunity, the Executive Director may approve changes made to the name, signage or working of the naming.

9.2 Changes originated by the donor or honoree require prior Executive Director approval. Any subsequent changes to signage or other infrastructure must be paid for in full by the donor or honoree.

10. Revoking a Naming Opportunity

10.1 The Schiele reserves the right to cancel a naming opportunity due to demolition of the asset, sale of the asset or an Act of God. Where possible, The Schiele shall offer an alternative option to the donor or honoree.

10.2 The Schiele reserves the right to revoke a naming opportunity if a donor fails to fulfil their pledge payments associated with the naming.

10.3 The Schiele may revoke the naming of any asset under the ethical principles of this policy noted in section 5. The Development department shall evaluate complaints of significant concern by any member of The Schiele community or general public and, where appropriate, take such complaints to the Executive Director and Board of Trustees for evaluation and decision.

10.4 The Schiele shall inform a donor or honoree in writing if their named asset is assigned to be revoked. The donor or honoree shall have 90 days to appeal the judgement, during which time the Executive Director may suspend the naming.

10.5 If no appeal is made or the appeal is rejected, the naming shall be revoked with immediate effect. In such cases, it is the position of The Schiele that any funds received and used in good faith under the terms of the gift up to the revocation shall not be returned, however, the donor will be relieved of any future pledge payments.