



NAMING POLICY

Policy Title	Naming Policy
Policy Owner	Vice President for Advancement
Responsible Office	Advancement
Contact Information	Questions concerning this policy or its intent should be directed to the Vice President for Advancement (909) 621-8192.
Pertinent Dates	This policy was approved on May 13, 2023.
Approved By	Board of Trustees of Pomona College
Scope of Policy	This policy applies to the naming of college assets and to other honors and recognition bestowed by the College, now or in the future. It also covers the reconsideration of namings of college assets and the revocation of other honors and recognition.
Who Needs To Know About This Policy	This policy governs College leaders, members of the Honorary Degrees Committee of the Board of Trustees, Past Presidents of the Alumni Board, and faculty and staff across campus who may participate in the College's consideration of non-gift honors, whether currently being awarded or to be awarded in the future. This policy also serves as a guide for Advancement gift officers and

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	<p>prospective donors and their advisors concerning naming gift opportunities, providing assurance that all donors are treated equitably. Others impacted by this policy include staff in Facilities and Campus Services, Finance, and Communications.</p>
Definitions	<ul style="list-style-type: none"> ○ <i>Donor</i>: An individual, foundation, non-profit organization, business/corporation, or other entity that makes a charitable contribution to the College. ○ <i>Non-Gift Honoree</i>: An individual or organization on whom the College has bestowed an honor or recognition, including without limitation recipients of honorary degrees and the Trustees' Medal of Merit, alumni awards, non-gift honorific namings of campus assets, or any other recognition. ○ <i>Non-Gift Honor</i>: Any honor or recognition bestowed by the College on an individual or organization, including without limitation honorary degrees and the Trustees' Medal of Merit, alumni awards, non-gift honorific namings of campus assets, and any other recognition. ○ <i>Charitable Contribution/Gift</i>: See Gift Acceptance, Counting, and Reporting Policy, Articles II and III.
Forms / Instructions	n/a
Related Information	<p>Gift Acceptance, Counting, and Reporting Policy (<i>Approved December 8, 2022</i>)</p> <p>Due Diligence Guidelines (<i>Approved February 18, 2023</i>)</p> <p>Capital Planning and Debt Financing Guidelines (<i>Approved May 2022</i>)</p>

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	Presidential Advisory Committee on Naming – Recommendations (<i>June 18, 2020</i>)
Reason for Policy / Purpose	To provide clear and consistent standards and processes for equitable, consistent, and appropriate recognition for generous support and to identify legal, reputational, and other potential risks associated with the approval of naming and other non-gift honors for donors or non-gift honorees, and for the reconsideration of such namings and non-gift honors.
Abstract	This policy applies to the naming of college assets and to other honors and recognition bestowed by the College, now or in the future. It provides the framework for when and how donors may be offered naming opportunities and recognition for their gifts, the types of gifts that may carry naming opportunities, naming gift minimums, naming approval and duration, donor recognition, and other terms. The policy also outlines when and how a naming or non-gift honor may be reconsidered and describes the reconsideration process related to the revocation or amendment of a naming or non-gift honor.

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Naming Policy

I. Applicability and Purpose

This policy applies to gifts with associated naming opportunities as well as non-gift honors as a form of recognition for the contributions of individuals or organizations to Pomona College. The College considers the naming of college assets (whether or not associated with a gift) in honor or memory of living or deceased individuals or of organizations, and other non-gift honors to be among the highest distinctions it can bestow.

This policy also implements recommendations made by the **Presidential Advisory Committee on Naming**, a representative group appointed by President G. Gabrielle Starr in 2019, by establishing a set of principles and processes to guide decision-making if new information about named buildings and/or funds warrants reconsideration of the naming.

II. Standard College Assets Designated for Naming

- A. **Buildings and/or Funds:** As used herein, “buildings and/or funds” means and refers to all college assets suitable for naming, including without limitation “physical entities,” “non-physical entities,” and “funds” as defined below.
- B. **Physical Entities:**
 - 1. Buildings and other major facilities, discrete components of buildings (wings, lecture halls, auditoriums, foyers, classrooms, laboratories, studios, offices, conference rooms, rooms, etc.), athletic facilities, and residence halls.
 - 2. Campus grounds and spaces, streets, monuments, commemorative plaques, outdoor renovations, art installations, thoroughfares and walkways, plazas, gardens, trees, fountains, benches, walkways, parking facilities, and other real property.
 - 3. Museums, libraries, or parts of museums or libraries, and other archives or collections of significant size and continuing educational, scientific, historic, artistic, or cultural value.
- C. **Non-Physical Entities:**
 - 1. Departments, institutes, centers, studios, programs, teaching awards, and prizes.

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2. Academic or non-academic positions and support, including but not limited to professorships, interdisciplinary chairs, visiting scholars, fellowships, lectureships, and research.
3. Student support, including but not limited to scholarships, fellowships, research, internships, and other student awards.

D. Funds:

1. **Endowed:** Endowed funds provide perpetual support to the College which may be unrestricted or restricted to a designated area or purpose.
2. **Non-endowed / Current-use:** Current-use funds provide immediate support to the College and may be unrestricted or restricted to a designated area or purpose. Gifts to name physical entities may be in this category.

III. General Terms

- A. **Compliance:** The naming of buildings and/or funds must comply with this policy and related procedures, and the College's **Gift Acceptance, Counting, and Reporting Policy** and its **Due Diligence Guidelines**.
- B. **Honor:** Naming gifts serve to honor donors and confer special recognition on them and on those for whom a building and/or fund is named. Therefore, the behaviors and stated beliefs of donors and those honored through naming gifts should align with the College's mission, vision, reputation, and values not only when the gift is received, but also for the duration of the naming.
- C. **Naming Gifts:** Donors may select the names of buildings and/or funds supported by their gifts, so long as the criteria set forth in this policy are met, and College approval is granted. As the College works with donors on proposed names, factors to be considered include:
 1. Consistency with the mission, vision, reputation, and values of the College.
 2. Whether a name may imply the College's endorsement of a political or ideological position or the use of a particular product or service.
 3. Potential conflict of interest (primarily in cases of corporate or organizational naming gifts).
 4. Whether the name reinforces the College's branding standards.
 5. Potential conflict with existing named buildings and/or funds.

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- D. **Naming vs. Use:** Naming gifts do not confer on donors any right to determine the use of buildings and/or funds (e.g., the purpose or use of the named space, specific beneficiary of a student or faculty support fund, program curricula, or research outcomes).
- E. **Announcement:** The naming of buildings and/or funds may not be announced before final approval as required by this policy and as mutually agreed upon by the College and donors.
- F. **Non-Gift Honorific Naming:** The Board of Trustees reserves to itself the power to bestow the honor of naming buildings and/or funds without an associated gift at or above Naming Gift Minimums (defined below). The Board might bestow such an honor for distinguished service or significant impact within the College community or beyond the College gates that merits recognition in the College's history (a "non-gift honorific naming").
- G. **Renaming:** The naming of buildings and/or funds may be reconsidered. *See Article IX, below.*

IV. **Naming Gift Minimums for Buildings and/or Funds**

- A. **Naming Gift Minimums:** The Board of Trustees will establish a framework of minimum gift values for the naming of buildings and/or funds (the "Naming Gift Minimums").
- B. **Vice President for Advancement:** The Vice President for Advancement will approve proposed gifts that meet the Naming Gift Minimums and will establish guidelines within the framework of the Naming Gift Minimums for naming buildings and/or funds, including College spaces within and outside of buildings; provided, however, any proposal for naming an entire building, facility, or residence hall (as opposed to a component thereof) will have the additional approval of the Advancement Committee.
- C. **Advancement Committee:** The Advancement Committee may approve exceptions to the Naming Gift Minimums and proposals to name an entire building, facility, or residence hall. The Advancement Committee will also review periodically and may recommend updates to the Naming Gift Minimums to ensure that minimum gift values take into consideration the projected real costs, scope, and donor interests, among other factors to meet the intended purpose of the naming gift; provided, however, that Naming Gift Minimums established at the beginning of a fundraising campaign counting period should remain constant throughout the campaign except in extraordinary circumstances and with appropriate notice to Advancement staff and consideration of ongoing gift conversations.

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- D. **New Buildings and/or Funds:** Buildings and/or funds that are new or budget-enhancing are subject to the minimums, approval of exceptions, and other provisions of paragraphs A-C, above, as well as the following:
1. When a new building, expansion, or renovation has been approved by the College in accordance with the **Capital Planning and Debt Financing Guidelines** approved in May 2022, minimum values of associated naming opportunities – spaces within and outside of the new building, expansion, or renovation – will be developed by the Vice President for Advancement in consultation with the College leader with oversight of the new building, expansion, or renovation.
 2. For new or budget-enhancing non-physical entities, the minimum values of associated naming opportunities will be developed by the Vice President for Advancement in consultation with the Vice President, Chief Operating Officer and Treasurer and the College leader with oversight of the new or budget-enhancing non-physical entities.
 3. For new or budget-enhancing endowed funds, the minimum values of associated naming opportunities will be developed by the Vice President for Advancement in consultation with the Vice President, Chief Operating Officer and Treasurer and the College leader with oversight of the new or budget-enhancing endowed fund to ensure that the fund will provide enough in distributions to sustain the program or initiative in perpetuity, or for its intended life.

V. **Named Endowed Funds**

- A. **Reinvestment Status until Gifts Reach Naming Gift Minimum:** A named endowed fund will remain in reinvestment status, meaning all the fund's income is reinvested in the fund's corpus, until gifts to the fund reach the College's required endowed fund minimum for an endowment of that specific type. Accumulated earnings and fund additions designated by the College, such as reinvested income, do not count toward meeting Naming Gift Minimums (i.e., only gifts count toward meeting the endowed fund minimum).
- B. **Early Conversion to Distribution Status:** The College leader with oversight of an endowed fund may request to convert the endowed fund from reinvestment to distribution status when the endowment reaches the minimum required by the College to establish an endowed fund, or

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when the College has received one-fourth of the value of the gift that established the endowed fund, whichever is greater.¹

1. A request for early conversion of an endowed fund from reinvestment to distribution status should be submitted to the Vice President for Advancement (or designee), who will confirm that the request is not inconsistent with any gift agreements pertaining to the fund. The Office of Stewardship will then work with the College's Finance division to convert the endowed fund to distribution status.
2. A request for early conversion of an endowed fund from reinvestment to distribution status that does not meet the threshold described above, may be submitted to the Vice President for Advancement, who will, in consultation with the Vice President, Chief Operating Officer and Treasurer, determine whether to grant the request.

VI. **Naming Approval and Timing of Naming Activation**

- A. **Naming Approval Process:** The Vice President for Advancement manages the naming approval process with reference to and in accordance with the **Gift Acceptance, Counting, and Reporting Policy** and the processes described therein for referring unusual, risky, or complex issues to the **Staff Gift Acceptance Committee** ("Staff GAC"). If the Staff GAC cannot reach consensus on a naming issue, or determines that the issue warrants further review, it may escalate the issue to a **Naming and Honors Advisory Group**, as described in Article XII, below, for consideration of the key concepts outlined in Article XI, below, and appropriate recommendation.
- B. **Gift Agreement Required:** All naming gifts require a gift agreement as provided in the **Gift Acceptance, Counting, and Reporting Policy**, as well as compliance with the **Due Diligence Guidelines**. Namings associated with capital projects and current-use funds require gifts or binding, irrevocable pledges payable within five-years, with the naming to go into effect when the gift or pledge is paid in full. If pledge payments toward a capital project are current, the naming may occur when the capital project is complete at the discretion of the Vice President for Advancement, and the naming may be removed if the pledge payments are not fulfilled.

¹For example, if the gift agreement provided for an endowed half scholarship to be funded with \$875,000 over 5 years, when gifts to the endowed fund reached \$218,750 (one-fourth of the value of the gift and more than the \$100,000 endowed fund minimum), the College leader with oversight of the fund could request an early conversion to distribution status.

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- C. **Special Approval for Naming of Building:** As provided in Article IV, paragraphs B-C, above, any proposed gift to name an entire building, facility, or residence hall (as opposed to a component thereof) shall be subject to additional approval by the Advancement Committee.
- D. **Non-Gift Naming:** Requests for non-gift honorific namings (*see Article III, paragraph F*) are subject to the **Due Diligence Guidelines** and approval by the President, who may further recommend consideration by the **Executive Committee** or the **Honorary Degrees Committee**, or both, before ultimate decision by the Board of Trustees.
- E. **Delayed Naming:** Name approval may not be granted until the proposed name is known. If the donor does not wish to select the name to be applied when the gift is made, the College may accept the gift, with the name determined later, subject to the terms of approval outlined in this policy as amended from time to time.
- F. **Naming with Deferred Gifts:** For life-income or legacy gifts, a name will not be activated until the proceeds of the life-income gift are released for the benefit of the College or the legacy gift is received by the College, subject to the named endowed fund or naming gift minimums in effect at the time of release of the life-income gift proceeds or receipt of the legacy gift.

VII. **Donor Recognition**

- A. **Purpose:** The purpose of donor recognition is to honor, engage, thank, and potentially cultivate future generosity, where appropriate. In showing appreciation to donors, recognition should be equitable and consistent based on gift type, amount, and purpose of the gift.
- B. **Physical Recognition:**
 - 1. Gifts to name a physical entity or department, unit, program, studio, or center will typically be recognized via signage, plaques, displays, or other physical installations.
 - 2. The nature and attributes of the physical recognition will be commensurate to the level and type of gift, designed in accordance with College's standards, and aligned with the features of the intended placement location.
 - 3. Corporate or organization logos may not be incorporated into recognition signage without approval of the Vice President for Advancement, in consultation with the President.
 - 4. While aesthetics, features, and placement are all at the sole discretion of the College, the gift agreement will specify the mutually agreed upon name to be used for physical donor recognition items such as plaques, nameplates, or signage.

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5. Physical donor recognition items must be approved by donors and appropriate College representatives before production and installation, and they may not be installed until the terms outlined in this policy have been met.
- C. **Other Recognition:** Naming gift donors may also be recognized via other means (e.g., events and media announcements), corresponding with the type, amount, and purpose of the gift.

VIII. Duration of Naming

- A. **Duration:** Naming is generally granted for the useful life or purpose of buildings and/or funds unless otherwise specified in the gift agreement and subject to the reconsideration provisions in Article IX, below. Specific examples include:
 1. *Endowed Funds:* In perpetuity.
 2. *Current-use Funds for Non-physical Entities:* For so long as the gift remains unspent, typically for the current or following fiscal year, unless the fund is replenished annually as a bridge until full funding of an associated endowed fund.
 3. *Current-use Funds for Physical Entities:* For the useful life of the physical entity, which may vary, but will generally last for not less than twenty-five (25) years from the installation of the naming signage, plaque, display or other physical installation and not more than fifty (50) years, unless otherwise expressly specified in the gift agreement. In the event a physical entity is damaged, relocated, or otherwise significantly altered in a timeframe less than 75% of the usual or agreed upon duration, the President upon recommendation of the Vice President for Advancement may determine an appropriate alternative recognition.
 4. *Gifts from Corporations:* Naming in recognition of corporate gifts shall not remain associated in perpetuity or for the entire life cycle of a building, feature, position, or program. Corporate naming opportunities shall be negotiated on a case-by-case basis for a predetermined period (in most cases, five years).
- B. **Changed Circumstances:** If circumstances change so that the purpose for which a named fund was established ceases to exist, is no longer needed, or needs to be significantly changed, or if a named physical entity is repurposed, deconstructed, severely damaged, destroyed or otherwise permanently closed, the College will consult with the donor if possible, or the donor's estate representatives or known heirs, if practicable, to determine an appropriate way to recognize the original naming gift.

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IX. Reconsideration of Naming or Non-Gift Honor

- A. **Conditions:** The College may reconsider and revoke or amend a naming or non-gift honor if any of the following conditions occurs:
1. A pledge obligation is unfulfilled and/or written off. If partial funding was received that is sufficient for an alternative naming opportunity, the terms of this policy shall govern any renegotiation for a suitable naming.
 2. A change in family or organizational circumstances causes the donor or other affected individual or organization to request a name change or revocation.
 3. The President determines that circumstances have changed so significantly that the College's continued association with the donor or the named individual or organization or the non-gift honoree warrants immediate action to avoid material damage to the reputation of the College, or that it warrants reconsideration and appropriate action by a **Naming and Honors Advisory Group** as described in Article XII, below.
- B. **Routine:** Revocation or amendment decisions based on the conditions described in paragraphs A.1 and A.2, above, shall be made in the usual course by the President based on the recommendation of the Vice President for Advancement.
- C. **Special:** Revocation, amendment, or reconsideration through referral decisions based on the conditions described in paragraph A.3, above, shall be made by the President after consultation with the Vice President for Advancement, Vice President, Chief Operating Officer and Treasurer, and General Counsel, with the decision reported to the Board of Trustees at the next regular meeting. Once the reconsideration process has been started as described in Article X, below, the President's decision to revoke, amend, leave as is, or refer for reconsideration to a **Naming and Honors Advisory Group** may be guided by the questions outlined in Article X, paragraph C, below, and the key concepts outlined in Article XI, below.

X. Process for Reconsidering Naming or Non-Gift Honor

- A. **Raising Concern:** A member or members of the Pomona College community (sometimes referred to as the "stakeholders who raised the issue") may raise a concern about the name of a building and/or fund or a non-gift honor by communicating with the Office of the President.
- B. **Written Statement:** The stakeholders who raised the issue should state in writing the concern as specifically as possible and provide as much information as possible about the troubling behavior and stated beliefs of the donor or the named individual or organization or non-gift

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honoree and the negative impact the name or non-gift honoree has on the stakeholders who raised the issue and the Pomona community at large.

- C. **Information to Consider:** The Vice President for Advancement will provide research about the donor, the named individual or organization (if different from the donor), and the circumstances around the gift or non-gift honor to aid the President's consideration of the following questions:
1. Is the scope of the ethical question significant?
 - Does available evidence suggest that the donor or the named individual or organization or non-gift honoree may have promoted or acted upon repugnant views or behaved in reprehensible ways with significantly damaging results?
 - Is the issue significant in the context of the full reputation or actions of the donor or the named individual or organization or the non-gift honoree?
 - Is the issue relevant to the function of the named building and/or fund?
 2. Is the issue durable?
 - Has it been brought forward over time by a substantial number of stakeholders?
 - If the issue has been raised before, consideration of previous research and decisions is recommended.
 3. Is it likely that retaining the name or non-gift honor will damage the College's ability to defend its values, to carry out its mission, or to maintain its reputation?
 4. How would revoking the name or non-gift honor affect relationships with donors or other stakeholders on whom the College relies?
 5. Are there legal obligations or other relevant considerations?
 6. How much time, effort, and expense would be required for the **Naming and Honors Advisory Group** process?
 7. Are the donor or the donor's estate representatives or known heirs available to consult with the College?
- D. **Communication:** When the President has decided whether to revoke or amend a naming or non-gift honor, refer the decision to revoke or amend to the **Naming and Honors Advisory Group**, or take no action, communication about the decision and the reasons for it to the stakeholders who raised the issue is recommended, with public announcement to follow, as appropriate.

XI. **Key Concepts in Reconsidering Naming or Non-Gift Honor**

- A. **Timing:** The naming of buildings and/or funds and the conferring of non-gift honors serve to honor donors and named individuals and organizations and bestow special recognition on them at the time of the naming or non-gift honor and for some period into the future, sometimes in perpetuity. For that reason, the behaviors and stated beliefs of individuals and organizations honored through naming or non-gift honor should align with the College's mission, vision, reputation, and values not only when the naming or non-gift honor is bestowed, but also into the future.
- B. **Opportunities:** With the College's ever-changing community of students, alumni, families, faculty, staff, and friends, concerns about the names of buildings and/or funds and non-gift honors present ongoing opportunities for teachable moments and for dialogue and shared learning that can highlight when stated values conflict with reality or perceived reality. Sometimes, resolution of these real or perceived conflicts may be difficult or possible only through compassion, humility, and thoughtful compromise. For an educational institution like Pomona, an important first step is recognition that a potential problem of significance has arisen, which can then allow for consideration of the potential problem as an opportunity for dialogue, learning, and community building.
- C. **Standard of Research:** Research related to individuals and organizations for whom buildings and/or funds are named or non-gift honors have been bestowed should be conducted with the same thoroughness and commitment to accuracy that characterizes all pedagogical and scholarly work at Pomona College.

XII. **Naming and Honors Advisory Group**

- A. **Representative Body:** The Naming and Honors Advisory Group (the "Advisory Group") is a representative body of key stakeholders charged with engaging in a deliberative process and making recommendations on matters related to the naming or renaming of buildings and/or funds or the granting or rescinding of non-gift honors.
- B. **Members:** As determined by and at the discretion of the Trusteeship Committee when needed, members of the Advisory Group might include:
 - 1. The Chair of the Board of Trustees (or designee), who shall act as Chair.

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2. The Chairs of the Advancement, Facilities and Environment, Honorary Degrees, or Audit & Risk Committees of the Board of Trustees (or, if they are not available, the Vice Chairs or other designees from the named Board Committees).
 3. One or more Trustees or Trustees Emeriti with subject matter, legal, or other expertise.
 4. A faculty member nominated by the Vice President and Dean of the College.
 5. A faculty member nominated by the Chair of the Faculty Executive Committee.
 6. An alumni representative nominated by the President of the Alumni Association Board (or designee).
 7. A member of the Associated Students of Pomona College (ASPC) nominated by the Vice President for Student Affairs and Dean of Students.
- C. **Staffing:** Once established by the Trusteeship Committee of the Board of Trustees, the Advisory Group will be staffed by the Vice President for Advancement and will operate when and for so long as there is need.
- D. **Confidential Deliberations:** The deliberations and recommendations of the Advisory Group are confidential. The report and recommendations of the Advisory Group may be made public at the discretion of the President after the final decision is reached.
- E. **Charge:** On matters referred to it, the Advisory Group is charged with determining as to existing names of buildings and/or funds or non-gift honors whether it is in the best interests of the College for the President or Board of Trustees, as appropriate, to:
1. Revoke the naming or non-gift honor;
 2. Amend the naming or non-gift honor; or
 3. Leave the naming or non-gift honor as is.
 4. If appropriate, other educational, remedial, or healing activities may be suggested.
- If the recommendation is to revoke or amend a naming associated with a gift, the Advisory Group will be encouraged to consider and suggest an appropriate way to recognize the original naming gift, if appropriate, as when the naming selected by the donor was for an individual other than the donor, and circumstances since then have changed.
- F. **What to Consider:** On matters referred to it, the Advisory Group shall hear from the Vice President for Advancement and General Counsel, may seek advice from subject-matter experts and outside consultants, and is encouraged to:

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1. Gather information about the donor or named individual or organization or the non-gift honoree to determine the scale and severity of relevant issues, including the questions outlined in Article X, paragraph C, above, and the key concepts in Article XI, above.
 2. Weigh the pros and cons of renaming of buildings and/or funds or rescinding of non-gift honors.
 3. Seek out and consider divergent views.
 4. Strive to create shared understanding.
 5. Explore potential resolutions and seek consensus.
 6. Report to the President on what has been learned and recommended actions, which may include retaining the name or non-gift honor, revoking the name or non-gift honor, or other educating or healing activities.
- G. **Approval:** All reports and recommendations of the Advisory Group should be approved by consensus during a meeting or by unanimous written consent. If consensus or unanimous written consent is reached, the final decision may be made by the President and reported to the Advancement Committee for naming gifts, the Honorary Degrees Committee for non-gift honors within its purview, or the Audit & Risk Committee for other non-gift honors. If consensus or unanimous written consent cannot be reached, or the President so chooses, the matter will be referred to the Advancement Committee for naming gifts, the Honorary Degrees Committee for non-gift honors within its purview, or the Audit & Risk Committee for other non-gift honors for consideration and recommendation to the full Board of Trustees for final decision. The respective Board Committee can consider matters referred to it during standing meetings or, if necessary, during special meetings that may be convened off-cycle to accommodate the timing of gifts or non-gift honors.
- H. **Informing Donor:** The College shall make reasonable efforts to inform the original donor and the named individual or organization, or the representatives or known heirs of the donor, individual, or organization, in advance of any renaming or rescinding of a non-gift honor.
- I. **Communication:** Once the decision has been made by the President or Board of Trustees as provided above, the President will report back to the stakeholders who raised the issue and to the community at large, as appropriate. All communications about decisions concerning the renaming or non-gift honor should come from the President or President's designee.

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- J. **Public and Private Information:** All information shared with the public and in public reports will be placed in the College archives. Confidential or private information will be maintained in the President's Office to aid institutional memory.

XIII. **Special Circumstances and Exceptions**

Any special circumstances or requests for exceptions must be referred to the Vice President for Advancement, who will determine the course of action, which may include consultation with the President or referral to the **Naming and Honors Advisory Group**.

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