

## DONOR RECOGNITION POLICY

### 1. Policy Statement / Purpose

Durham University seeks to acknowledge and celebrate the generosity of its benefactors.

### 2. Scope

The policy is a guide to prospective benefactors and members of the University community

The policy deals with the most common forms of recognition, but the University is open to considering others should benefactors so wish.

### 3. Responsibilities

The Development and Alumni Relations Office (DARO) is responsible for overseeing the implementation of this policy.

### 4. Policy, Procedures and Enforcement

#### **Acknowledgement**

Unless anonymity is preferred, all donations of whatever monetary value will be acknowledged by the University annually through publication of a list of donors on its website and in publications it produces for internal and external audiences. In addition, donors will be invited to events hosted by the University to express our appreciation.

#### **Naming Recognition**

Over and above inclusion in the University's published list of donors, naming recognition is available to the most generous benefactors. Naming recognition permits a building, a room, a lecture theatre, a Chair, scholarships, an academic prize, a major piece of equipment, or some other facility or item of value to the University to be named in honour of an individual or organisation. Benefactors may consider dedicating their contributions to honouring another person, whether living or deceased, or they may secure naming recognition for themselves or an organisation of their choosing, such as a company or philanthropic trust or foundation. Conditions regarding naming opportunities must be captured in the underlying Gift Agreement between the University and the benefactor.

#### New Facilities and Major Equipment

Naming recognition for new facilities, such as buildings, laboratories (including computer laboratories), lecture theatres, sports centres, and major items of equipment, may be awarded provided that the donation equals or exceeds 51% of the cost\* of the fundraising target of the facility or equipment. In the event that a benefactor should wish to sponsor a particular section of a new building or physical facility, such as a seminar room or a basketball court, the University may consider awarding naming recognition to that section if the donation equals or exceeds 51% of the cost per-square-metre of its construction.

#### Existing Facilities and Major Equipment

Naming recognition for existing physical facilities and equipment are available to benefactors who make a donation to the University which equals or exceeds 51% of the current value\* of the fundraising target of the facility or equipment. The donation need not be utilised directly in the maintenance, repair or refurbishment of the facility or equipment, but may instead be dedicated to some other purpose by mutual agreement between the benefactor and the University. Naming recognition cannot be made available for facilities and equipment which have already been named at the behest of a previous benefactor or named by the University to honour an individual.

\*The following factors are used to determine the naming cost/value:

- Past/current naming levels of other buildings at Durham;
- Levels of investment for named buildings at peer and aspirant schools/universities;
- The *Durham Inspired* goal;
- 'Market' demand and 'what it will bear';
- The prominence of the building, its footfall/use and attractiveness.

#### Refurbishment of Facilities

The University may consider awarding naming recognition to facilities in need of refurbishment provided that any donation received for this purpose amounts to 100% of the fundraising target of the cost of the required refurbishment. Naming recognition cannot be made available for facilities and equipment which have already been named at the behest of a previous benefactor or named by the University to honour an individual.

#### Endowed Chairs, Lectureships, Scholarships and Bursaries

The endowment provided for a named Chair or lectureship must be sufficient to sustain the full cost-to-employer of the Chair in perpetuity. For a Chair this is currently at £2.5m and for a lectureship it is at £1m. Given that these may change over time, the budgets associated with Chairs and lectureships should be discussed with the DARO lead when the funding for the post is considered.

The endowment for a named scholarship or bursary must be sufficient to support the full tuition and subsistence costs of at least one student per annum in perpetuity. This will vary between disciplines and degree and is best discussed in person.

#### Sponsored Chairs, Lectureships, Scholarships and Bursaries

Naming recognition will be awarded for sponsorship of a Chair or a lectureship for a specific period provided that the gift covers the full cost-to-employer of the Chair or lectureship for this period. Naming recognition will endure only for as long as the benefaction lasts.

Naming recognition for scholarships or bursaries which are supported by means other than an endowment, such as a one-off donation or annual grants, will endure only for the period for which funding is made available.

#### Prizes

Prizes of various kinds may be named after a benefactor or a nominee provided that the value of the prize is supported by the benefactor for a period of five years or more.

### **Naming Recognition Approval**

Names will be agreed between the benefactor and the University:

- a) All naming and recognition opportunities at/below £250k to be approved by the Director of DARO in consultation with the relevant project/department lead and reported to UEC for approval;
- b) Naming and recognition opportunities over £250k up to and including £5m to be approved by UEC and reported to Council for information;
- c) Naming for all new building opportunities and any naming and recognition opportunities over £5m to be approved by Council.

### **Alterations of Circumstance**

Naming recognition which has been awarded in perpetuity will be honoured by the University subject to the following provisions:

Such recognition may be withdrawn if, in the sole opinion of the University Council, continued eponymous association of the institution with the named individual or organisation is likely to

harm its reputation or bring it into disrepute. In this event, the University shall not be obliged to return the original amount, but may choose to do so at its sole discretion.

Should the criteria describing a scholarship award become unmanageable, illegal or obsolete (e.g. criteria based on gender, religion or nationality) the University reserves the right to adjust the criteria.

In the event that a named Chair which is supported by an endowment is ever disestablished for any reason, the yields of the endowment may be dedicated to a function or purpose within the institution which, in the opinion of the University, most closely approximates the original intention of the benefactor. Naming recognition will be transferred to this new function or purpose.

Should a named building, section of a building or piece of equipment ultimately be replaced or become obsolete, the benefactor or nominee will be honoured in a manner which the University deems to be commensurate with the original donation and the spirit in which it was provided and received.

### **Conditions and Alternative Forms of Recognition**

The forms of recognition and associated conditions described here are neither fixed nor exhaustive. Prospective benefactors are welcome to suggest variations, or request any other conditions which may accord better with their circumstances or wishes.

### **5. Equality and Diversity**

This policy has been designed to ensure that no-one receives less favourable treatment due to protected characteristics.

### **6. Related Information**

This policy should be read in conjunction with the University's [Gift Acceptance Policy](#). The Gift Acceptance Policy outlines the ethical nature of the University's due diligence processes and the acceptance of philanthropic gifts that are used to advance Durham's strategic objectives.

### **7. Definitions**

Not applicable.

### **8. Version Control:**

Approval date: 01/11/2019

Approved by: Council

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