

THE TEXAS A&M UNIVERSITY SYSTEM HEALTH SCIENCE CENTER RULES

51.06.99.Z1 Naming Opportunities

Approved April 7, 2010

Supplements System Policy 51.06

1. GENERAL

The purpose of this guideline is to establish criteria for naming opportunities that recognize donors making major financial contributions to The Texas A&M University System Health Science Center (HSC). This rule provides general policy guidance and encourages fund raising for gifts that permanently associate the name of a donor, corporation or foundation with that of the HSC. While the Board of Regents has the final authority on named funds throughout The Texas A&M University System (System), this rule seeks to promote further philanthropy and expand donor connections.

The naming opportunities pricing structure must be fair and equitable. It should recognize flexibility among the colleges as buildings, student support, professorships and other funds might vary in costs. Thus, each naming situation should be judged on its own merits. For example, "budget realities" might require an endowed chair in one component to be priced at a higher level than an endowed chair in another area.

To properly administer a named fund, each gift must be accompanied by a gift agreement that has been approved by representatives of the donor, HSC and the college that will benefit from the contribution. This is not a comprehensive list of naming opportunities. Other opportunities as identified by the HSC President, deans, director, faculty and/or development personnel will be considered on a case-by-case basis.

2. ADMINISTRATION OF GUIDELINES

The deans and director shall be responsible for pricing naming opportunities within their individual components. Otherwise, the President of the HSC shall have authority to recommend naming recognitions. Deans and directors are encouraged to adhere to the funding minimums defined in this guideline in their preliminary negotiations, but they are also granted the discretion, in consultation with the President and subject to final Board of Regents approval, to consider other funding amounts that will best serve the interest of the HSC.

Generally, naming opportunities will not be recognized through a planned, pledged or deferred gift until the gift amount is fully funded. In all cases, the proposed name must be approved and forwarded by the President and submitted to the Board of Regents in accordance with System policies.

3. PROCEDURE FOR NAMING GIFTS

When a named gift opportunity is forthcoming, the HSC Vice President for Institutional Advancement must be notified. A description of the project, program or fund to be named, the proposed name, a profile of the donor, the amount of the gift, and information about how the gift will be paid should be provided in writing.

The HSC Vice President for Institutional Advancement will discuss the proposed gift with HSC officials, including the President. Following those discussions, the President will send a memorandum to the Chancellor, co-signed by the appropriate component officers, if necessary, recommending Board of Regents approval.

A naming opportunity other than the naming of an endowment as specified below shall be reviewed by the HSC and be approved by the System Board of Regents per System Policy 51.06, *Naming of Buildings and other Facilities*.

4. NAMING OPPORTUNITIES/GIFT AMOUNT

The following criteria should be included when considering named gifts:

Entire Building: In general, a building should be named only if a minimum of 50 percent of the privately secured funds (the campaign goal), but not less than \$5 million or 10% (whichever is greater) is contributed by the donor, at the direction of the donor, or on the donor's behalf.

Building Additions: Not less than 50 percent of project construction costs.

Portions of Buildings: Individual rooms or wings in new or existing buildings, such as auditoriums, labs, lecture halls and adjoining outdoor courtyards, need to be considered on a case-by-case basis. Consideration will be given to such matters as type of usage, visibility and traffic flow and size.

Unnamed Existing Building: Unnamed buildings may be named by the establishment of an endowment equivalent to 15 percent of the fair market value of the building.

Named College: Associating an individual, corporation or foundation name with a college acknowledges a donor's professional achievements and commitment to the college or school. Gift levels associated with a college naming opportunity will be determined as necessary.

Named Academic Department: A donor may name an academic or research unit after consulting with the appropriate dean or director and with the President's approval. A minimum gift of \$5 million is required.

Named Center: Research and clinical centers can be named for a minimum gift of \$2 million.

Endowed Chair: The endowed chair designation will be given to a select faculty position filled by an outstanding scholar, teacher and/or researcher, as judged by rigorous, nationally accepted standards. The minimum gift amount is \$1 million.

Endowed Professorship: An established or promising scholar will occupy the faculty position designated as a named professorship. Faculty members whose accomplishments indicate potential for national and international leadership and distinction in their field, and whose current efforts are focused on teaching skills and/or establishing a superior record of research or other scholarly activity, typically holds named professorships. The minimum gift amount is \$500,000.

Endowed Fellowship: Fellowships are a form of educational financial assistance for graduate students and post-doctoral fellows. They also provide funds to attract top junior faculty to the HSC. The awards provide full or partial financial support that enables students to complete their educational experience at the HSC. Specific criteria for eligibility will be established in consultation with the donor and approved by the component dean or director. The minimum gift for an endowed fellowship is \$100,000.

Endowed Lectureship: The designation of an endowed named lectureship holder is reserved for a leading scholar or researcher who becomes a part of the HSC community for a specified period, but who typically does not occupy a permanent position on the faculty. Promotional materials and the compensation package might include housing, travel arrangements, and speaker's fees. The minimum gift is \$50,000.

Named Endowment Fund: An endowed fund may be established by a donor in support of a component, department, academic discipline or other HSC program of interest to the donor. The earnings from such a fund may be used to enhance the selected program in various ways, including support for research, faculty development, teaching award, or other educational enrichment activities. The minimum amount for a named endowment is \$25,000.

Endowed Scholarship: Scholarships aid deserving, talented students. Only the earnings of an endowed scholarship are distributed for student support. Specific criteria for eligibility may be established in consultation with the donor and approved by the component dean or director. The minimum gift for an endowed scholarship is \$25,000.

Naming Opportunities Summary

Item	Minimum Amount
Entire Building	\$5,000,000 or 10% (whichever is greater)
Building Addition	50% of project construction costs
Portions of Buildings	Case by case
Unnamed Existing Building	15% of fair market value
Named College	To be determined
Named Academic Department	\$5,000,000
Named Center	\$2,000,000
Endowed Chair	\$1,000,000
Endowed Professorship	\$500,000
Endowed Fellowship	\$100,000
Endowed Lectureship	\$50,000
Named Endowment Fund	\$25,000
Endowment Scholarship	\$25,000

OFFICE OF RESPONSIBILITY

Vice President for Institutional Advancement