

Meeting Date: February 13, 2023
Type of Item: Policy Revision Review
Subject: Naming Opportunities Policy
Presented by: Selena Paulsen
Recommendation: Review and adopt revised policy

### **Background**

As the District's first Development Officer, Selena Paulsen has been tasked with reviewing and updating the District's existing policies relating to Naming Opportunities (3.9) adopted April, 2011, (no revisions recorded). The result of the review process is a comprehensive rewrite of the existing policy to: help the District be up to date with current industry practices, include appropriate guidance for Development work on the District's behalf, create an equitable and consistent process for donors, and create alignment with the District's current mission and values.

### The Process

- Conducted a review of policies relating to naming opportunities from libraries around the United States.
- Participated in online discussions regarding applicable policies with library development professionals from around the United States and Canada.
- Held internal discussions with executive leadership staff regarding policy revisions.
- Reviewed existing policies in relation to Development workplan and best practices and noted needed revisions.

### Policy Revisions

Based on research and comparisons, it was clear that existing policies related to naming opportunities would need to be updated in order to reflect current practices in fundraising and Development, as well as the work program for the Development function of the District, and the Libraries' mission and values. Specifically, the proposed revised policy addresses:

- Requirements for naming opportunities
- Authority within the District for approval of naming opportunities
- Expectations regarding documentation of naming agreements
- Expectations regarding publicity around naming opportunities
- Clarification around the role of related groups such as the Friends of the Libraries, and the Library Trust

### **Recommendation**

*Adopt revised policies.*

*Poudre River Public Library District Policies*

**3.9 Naming Opportunities** REVISION DRAFT 2-13-23

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It is the policy of the Poudre River Public Library District (Libraries) to retain the option to recognize the generosity of an individual, family, corporation, foundation, and/or other donor(s) by choosing to create a specific naming designation for a library program, collection, or portion of a facility that is in conformity with the nature and mission of the Libraries. The Board of Trustees of the Poudre River Public Library District believes that libraries play an essential role in the quality of life of our citizens and in this important function, the Libraries are supported through public funding and are supplemented by gifts, with the caveat that gifts must not undermine the integrity of the non-commercial public space that the Libraries provide. Standard donor recognition in places like the Libraries' Annual Reports, electronic communications or website is separate from this policy and is at the discretion of the Executive Director of the Libraries.

**Principles and Guidelines**

- A. The Library District has the sole right to name or rename library programs, collections or facilities, and may decline any gift to the Libraries, and/or reject naming proposals.
- B. Entities such as the Poudre River Library Trust and the Poudre River Friends of the Library that raise funds for the benefit of the Libraries will refer all naming requests to the Libraries and are not authorized to offer or negotiate any naming opportunities.
- C. The Library District reserves the right to revoke a prior grant of named recognition whenever compelling reasons or circumstances justify such action.
- D. This policy is subject to all applicable Colorado and federal statutes and as such may be amended from time-to-time.
- E. The Board of Trustees may appoint the Executive Director as their designee to approve certain types of naming/renaming opportunities.
- F. Naming rights will not be granted to any individual, family, or organization that discriminates on the basis of gender, age, race, sex, color, religion, creed, ancestry, national origin, disability, sexual orientation, marital status, military status, genetic information, or any other status protected by applicable state or local law.
- G. Naming rights will not be granted to any religious or political organization.
- H. Donations for naming rights must meet all guidelines and standards of the Libraries' Gift Policies.
- I. All major capital campaigns will include a naming concept. The Libraries will develop the concept including specific naming opportunities, and submit that concept to the Board of Trustees for approval prior to the launch of the capital campaign.

- J. At the beginning of each fiscal/calendar year the Libraries will create and make available to the public donor materials that include any naming/renaming opportunities for the upcoming year, as well as any capital campaign naming opportunities approved by the Board of Trustees.
- K. Naming/renaming is valid for a specified period of time, and not in perpetuity. Whenever possible, the Libraries will make the durations for naming/renaming opportunities available in donor materials and will work to insure durations are consistent across equivalent donation amounts and/or similar naming options.
- L. Naming/renaming may take various forms at the discretion of the Libraries. For example: "The [donor name] Children's Reading Room" or "The Children's Reading Room, Courtesy of [donor name]." The Libraries may use either form, or a similar option dependent on the circumstances and what they deem appropriate.
- M. All naming/renaming must include an agreement signed by the donor and the Executive Director of the Libraries. At a minimum the agreement will provide an exact description of the item/program to be named, the amount of the donation, the specific name that will be used for the naming, and the duration of time the name will be used.
- N. All signage for naming must be approved by the Libraries and designed to fit with the surrounding aesthetic as well as the Libraries' branding. The cost of signage will be taken into account when negotiating donations for naming opportunities.

### **Naming Opportunities**

- A. Meeting rooms, reading lounges, special use areas, equipment, gardens, walkways and other interior and exterior spaces may be named or renamed in accordance with these policies. Appropriate contributions for such naming opportunities will include calculations of square footage cost, actual cost of equipment, on-going operating cost, etc, depending on the specific area or item.
- B. Endowment proposals, such as those for programs and collections, may also include naming rights. Donors may make a single gift, or build an endowed fund over time. A minimum initial endowment contribution will be \$50,000, and the Libraries will solicit donations to said endowed fund (without naming rights) from a variety of entities to grow the funds. All endowed funds will be managed by a qualified entity approved by the Libraries.
- C. Programs and collections may be named or renamed to recognize a donor. Appropriate contributions for such naming opportunities will include calculations of the cost of materials, staff, on-going operating costs, etc. depending on the specific program or collections.
- D. Library buildings shall only be named based on the building location, geography or neighborhood.