

Naming Opportunity Policy					
Approval Level:	Board of Governors				
Approval Date:	2020-09-30	Revised Date:	2026-09-23	Review Date:	2029-09-01
Responsible Portfolio/Unit/Committee:	External Relations				
Responsible Officer(s):	President, Vice-Chancellor, Dean & CEO				

1.0 Purpose

The purpose of this Policy is to establish clear and consistent guidelines for the naming of physical spaces, institutional assets, and academic entities at NOSM University ("the University"). It ensures that naming decisions reflect the University's values, recognize philanthropic contributions or distinguished service, and align with institutional governance and strategic priorities.

2.0 Scope

This Policy guides the granting of Naming Opportunities at NOSM University for the following assets:

- buildings, parts of buildings, facilities and common or green spaces;
- programs, departments, centres and institutes and other academic units; and
- other assets deemed appropriate by the University to recognize philanthropic donations or distinguished service.

Naming Opportunities within facilities not owned by NOSM University but occupied by the University shall be negotiated in alignment with prospective donors and be consistent with the approved policies of the partner institution.

NOSM University retains authority over the naming of programs, assets, and spaces within such facilities.

2.1 Naming of Student Bursaries and Scholarships

The naming of student bursaries, scholarships, chairs, professorships, fellowships, lecture series, or other academic appointments or initiatives and other financial awards are not governed by this Policy. Such naming opportunities are subject to separate guidelines and approval processes administered by the Office of Advancement and the Office of the Registrar and must comply with applicable University policies and relevant privacy legislation, including the Freedom of Information and Protection of Privacy Act (FIPPA).

3.0 Definitions

For the purpose of this Policy:

TERM	DEFINITION
Gift Agreement	A Gift Agreement is a formal legal document between a donor and NOSM University that outlines the donor's philanthropic contribution and the terms under which the gift will be received, administered, and used.
Perpetuity	A naming in perpetuity means the name will remain associated with a space, program, or endowment permanently, unless otherwise revoked under specific conditions.
Honorific recognition	Honorific recognition refers to acknowledging or celebrating a person's contribution, legacy, or support by naming something in their honour or publicly recognizing them in a meaningful, lasting way.
Academic or research related assets	Academic or research-related assets are tangible or intangible resources that support teaching, learning, and the creation, application, or dissemination of knowledge within an academic institution. Examples include simulation labs and specialized lab equipment.
Naming recognition	Naming recognition is a form of acknowledgment in which an institution assigns a donor's or honouree's name to a specific asset, initiative, or space in recognition of a significant contribution, achievement, or legacy. It is typically a formal, visible, and often long term or permanent form of recognition used in academic, healthcare, and nonprofit settings.
Donor associated naming	Donor-associated naming refers to a form of recognition in which a donor's name is formally linked to an asset, program, or initiative without necessarily assigning it as the official or primary name. For example, a space or program may be described as "supported by" or "made possible through the generosity of" a donor.

4.0 Naming Authority

The Director, Advancement and/or the Associate Vice-President, External Relations and the President, Vice-Chancellor, Dean and CEO ("President") must be consulted prior to making any offer of named recognition.

All Naming Opportunities must follow this Policy and the Matrix Approvals and Terms Limits as outlined below:

5.0 Naming Opportunity Matrix Approvals & Term Limits

Value	Terms	Approval Level
\$1,000,000 - \$4,999,999	Up to 10 years	President
\$5,000,000 - \$24,999,999	Up to 20 years	Board of Governors
\$25,000,000+	Up to 30 years or in perpetuity	Board of Governors

For naming in perpetuity, a minimum gift of \$25,000,000 is required.

For gifts exceeding \$25,000,000 that are proposed for naming in perpetuity, a premium of 40% above the applicable naming threshold will be required. Final approval remains subject to the approval of the Board of Governors.

Example: Qualifying for Naming in Perpetuity (Illustrative Purposes Only)

Description	Amount
Applicable Naming Threshold	\$40,000,000

Perpetuity Premium (40%)	\$16,000,000
Total Required for Naming in Perpetuity	\$56,000,000

Result: The proposed gift of \$60,000,000 exceeds the minimum funding requirement of \$56,000,000 and may be considered for naming in perpetuity, subject to approval by the Board of Governors.

5.1 Research

In the case of academic or research-related assets, the President shall consult with the Provost, Vice President Academic and/or Vice President Research and Graduate Studies as appropriate to the designation of the gift, prior to making any recommendation to the Board of Governors.

5.2 Honourific Recognition

Honorific recognition through naming may also be extended to individuals who have made an exceptional personal contribution to the University or to society in general. In such cases, written proposals shall be submitted to the Director, Advancement, who shall, following consultation with the President and/or the Executive Group, make a recommendation to the Board of Governors for final approval.

5.3 Reporting

A report of all Naming Recognitions shall be submitted annually to the Board of Governors.

6.0 General Requirements for Naming

Naming Opportunity Proposals shall be submitted in writing and must include the following elements:

1. **Donor Agreement** – All naming opportunities must be subject to a formal donor agreement.
2. **Description** – A clear description of the naming recommendation being proposed.
3. **Institutional Importance** – A statement outlining the significance of the naming to NOSM University.
4. **Term and Implications** – The proposed term of the naming (with rationale), including short- and long-term implications and provisions for potential future renaming.
5. **Timing Considerations** – An assessment of the appropriateness of the timing, particularly where the naming recognizes a retired or deceased individual.
6. **Impact Assessment** – Identification of any conditions, concerns, or impacts on the academic unit and/or the University.
7. **Due Diligence** – Confirmation that appropriate due diligence has been conducted.
8. **Policy Integration** – A provision stating that this Policy is incorporated into the proposal or agreement.
9. **Gift Agreements** – All gifts, including those conferring Naming Recognition, must be documented through a written gift agreement prepared by the Advancement Office.
10. **Review and Approval** – Gift agreements will be reviewed and endorsed by the Planning and Risk Management Unit and must comply with all applicable University approval levels and signing authorities before being executed by the donor and the University.

Additional Requirements for Donor-Associated Naming

For proposals involving philanthropic contributions, the following additional information must be included in the Naming Opportunity proposal and will form part of the review and approval process established under this Policy.

1. **Gift Statement** – A description of the nature and impact of the gift, including the expected schedule of payment.
2. **Strategic Significance** – An explanation of how the gift supports the realization or success of the associated project or priority or enhances its usefulness to the University.
3. **Program Relevance** – Where applicable, a rationale for the naming of a new unit or program, including its relevance, sustainability, and alignment with NOSM University's strategic priorities.

7.0 Due Diligence and Removal or Discontinuation of Naming

The individuals responsible for proposing a Naming Opportunity shall conduct appropriate due diligence to ensure that the person or entity being honoured is of sound reputation and that the Naming complies with this Policy and all other applicable University policies. Legal Services may be engaged, as required, to support NOSM University's Planning and Risk Management Unit in completing this due diligence. The Approval Authority must be satisfied that appropriate due diligence has been completed prior to approving any naming recognition.

NOSM University retains the sole discretion to approve, decline, continue, modify, or discontinue any naming recognition at any time, with or without cause, and without liability to any party, including after implementation.

The University may review, revoke, or alter any naming or recognition where:

- Information arises that may reasonably be expected to bring disrepute to NOSM University, or creates actual or perceived reputational risk, or is inconsistent with its mission, values, or public trust.
- The donor or honouree becomes associated with conduct, activities, or circumstances that may negatively affect the integrity, reputation, or credibility of the University.
- The philanthropic commitment is not fulfilled in accordance with the terms, conditions, or payment schedule outlined in the gift agreement.

Naming recognition is granted conditionally and does not create an obligation for NOSM University to maintain recognition in perpetuity unless explicitly stated in a formal agreement approved by the Board of Governors.

Ultimate authority to discontinue, amend, or transfer the designation of a named asset or fund rests with the Board of Governors, following consultation with the President, Legal Services, and the Planning and Risk Management Unit. Such decisions shall be final and not subject to appeal.

8.0 Visibility

- a) Visual identities for all named entities will be consistent with the institution's branding and wayfinding protocols as defined by the Communications and External Relations Unit.
- b) The Director, Advancement and the Associate Vice-President, External Relations will be consulted on all named space recognition signage.
- c) All signage for recognition and naming purposes will always remain visible and will not be covered by posters, flags, banners, or any other marketing or publicity materials.
- d) All costs associated with signage will be the responsibility of the donor.
- e) If a donor requests a change to a naming recognition, all associated signage costs will be borne by the donor.
- f) External corporate logos will not be permitted on the University's recognition signage.

9.0 Confidentiality

All discussions related to proposed naming opportunities, including formal proposals, shall be treated with the utmost confidentiality by all parties involved, in accordance with applicable privacy legislation, including the Freedom of Information and Protection of Privacy Act (FIPPA), until an official public announcement is made by NOSM University.

10.0 Responsibility

The Director, Advancement is responsible for maintaining the inventory of named assets and preparing the annual report to the Board.

The Associate Vice-President, External Relations provides the oversight to ensure consistent application of the Policy.

The President provides final approval where delegated and makes recommendations to the Board of Governors as required.

A record of approved Naming Opportunities and naming levels will be maintained in the University's inventory of naming opportunities.

11.0 Related Documents

- Endowed and Fixed-term Chair Policy and Procedure

12.0 Getting Help

Questions regarding interpretations of this document should be directed to the Director, Advancement at email: advancement@nosm.ca