



# USA Naming Rights Policy

## RATIONALE

The University of San Agustin (USA) seeks to recognise people or organisations that have either supported the University through distinguished contribution to the University or philanthropic support of the USA eight (8) advocacies by naming facilities or entities in his/her honour. This document governs the procedure and criteria for such naming (in consideration or in recognition) and covers assets such as: Physical spaces, Academic entities, positions, events, activities, scholarships, prizes, student project support, among others.

UNIVERSITY OF SAN AGUSTIN

Gen. Luna St. Iloilo City

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# University of San Agustin

## NAMING RIGHTS POLICY

### 1. INTRODUCTION

1.1 The University of San Agustin (USA) seeks to recognize people or organizations that have either supported the University through distinguished contribution to the University or philanthropic support of the USA eight (8) advocacies by naming facilities or entities in his/her honour. This document governs the procedure and criteria for such naming (in consideration or in recognition) and covers assets such as: Physical spaces, Academic entities, positions, events, activities, scholarships, prizes, student project support, among others (Please see Annex 1). It is understood further that the university and the donor may draw a supplementary agreement which shall be governed by the provisions of this document.

### 2. DEFINITION OF TERMS

2.1 **Naming Rights in Consideration** – are in consideration of financial contributions, sponsorship, or other commercial transactions.

2.2 **Naming Rights in Recognition** – are in recognition of any significant contributions to the University that it wishes to honour. These contributions can be financial, other gifts from donors, or meritorious service, and are at the discretion of the University in agreement with the party or their representatives.

### 3. POLICY STATEMENT

#### 3.1 **Naming Rights in Consideration**

3.1.1 Naming rights may be granted by the University in consideration of contributions made often through the University of San Agustin Research and Development Foundation, Inc. (USA RDFI). Naming Rights in Consideration may be granted in return of an appropriate financial contribution or sponsorship, including provision or supply of equipment, materials, land or services. Typically this is a commercial arrangement where the consideration may include display of logos, company names, marketing opportunities, and events during the course of the arrangement, which is normally time-bound.

3.1.2 Should there be no valuation assigned, the value of the consideration provided will be decided on a case-by-case basis.

#### 3.2 **Naming Rights in Recognition**

3.2.1 Naming rights may be granted at the sole discretion of the University in recognition of persons or entities it wishes to honour. For example, persons with records of honourable and long service to the University may be recognised by the naming of lecture rooms, laboratories, conference rooms, walks, gardens, etc.

3.2.2 One of the following three criteria must be fulfilled in order for the granting of Naming Rights in Recognition to be considered:

**3.2.2.1** Recognition of outstanding service to the University whilst serving in an academic or administrative capacity; or outstanding service to the University community or to the community.

**3.2.2.2** Recognition of the achievements of distinguished alumni.

**3.2.2.3** Recognition of a generous financial or other contribution from a donor (be it by way of donation, bequest, sponsorship, etc.), such contribution being voluntary and of a philanthropic nature and not rendered in consideration of the granting of naming rights.

**3.2.3** The granting of Naming Rights in Recognition is at the sole discretion of the University, with the agreement of the party or their representatives.

#### **4. GENERAL PRINCIPLES**

**4.1** The following general principles must be taken into consideration when negotiating naming rights:

**4.1.1** Due regard should be taken of the need to maintain an appropriate balance between commercial considerations and the identity of the University of San Agustin as an Augustinian Catholic Institution imbibing the principles of *unitas* (unity), *caritas* (charity) and *veritas* (truth).

**4.1.1.1** The granting of naming rights must always be consistent with the University's vision and strategic priorities.

**4.1.1.2** The department/college or unit affected by the naming rights to be granted must be consulted before any decision is made. Likewise, colleges, departments or unit seeking to secure naming rights must consult with the Director, Philanthropic, External and Alumni Relations (PEAR) Office before any approaches are made to possible donors.

**4.1.1.3** The person or entity being recognized understands that the naming rights privilege granted does not entail any diminution of the governance, management or academic freedom of the University or any University entity.

**4.1.1.4** The period applicable to specific naming rights shall depend upon the circumstances of the individual negotiation (as guided by Annex 2) provided that:

**4.1.1.4.1** There be no obligation to transfer the naming rights if the facility or entity no longer exists; and

**4.1.1.4.2** There be no requirement to retain the name if it is drawn into disrepute. The University President shall consider whether naming rights should be withdrawn in these circumstances as recommended by the PEAR Director.

**4.1.1.5** For proposals that do not currently fit within the University's eight advocacies and strategic priorities and are not in the current strategic plan, but are still desirable, a higher level of funding would normally be required to secure the project. Naming rights will be pursued via the approval procedure set out below.

## **5. DELEGATIONS**

**5.1** The University of San Agustin Board of Trustees (BOT) is the body that grants naming rights. In any particular case or cluster of cases, BOT may delegate approval authority to the University President, consistent with the capital expenditure delegations in the Delegations Schedules, on the following:

**5.1.1** Naming rights for whole buildings and for major spaces on or off campus (owned or leased by the University) are recommended to the BOT for approval.

**5.1.2** Naming rights for all other structures, facilities or entities (owned or leased by the University) will be discussed informally with the Director of the Philanthropic, External and Alumni Relations Office who will signal any concerns and whether a formal proposal should be prepared for the University President.

**5.1.3** Subject to the above, naming rights for all other facilities or entities will be approved by the University President, on the recommendation of the PEAR Director in consultation with the unit head (where physical assets are involved).

**5.1.4** Where there is significant disagreement between stakeholders or contentious issues are identified, the matter should be referred to USA BOT as the deciding naming authority.

## **6. NAMING RIGHTS APPROVAL PROCEDURE**

**6.1** Negotiations with potential benefactors will be held in confidence, and will be flexible, due to the competitive nature of philanthropic funding. Bearing this in mind, any affected stakeholders will be advised of the proposed naming as soon as possible. Typically the process for naming rights in association with building projects is initiated by or through the PEAR Office.

**6.2** Other initiators may include the college deans or the principal of the Basic Education Department (BED), and Alumni. Regardless of the initiator, the approval process for naming rights is:

**6.2.1** Consultation among the PEAR Director, Director of Administrative and General Services Office (AGSO), VP for Admin and Finance, Institutional Legal Counsel, USA RDFI and unit head concerned.

**6.2.2** The PEAR Director is charged to consult with the USA Alumni Association and USA Student Council or other student groups or other stakeholder groups directly impacted as determined by the PEAR Director.

6.2.3 Before any specific recommendation is arrived at, the PEAR Director discusses options informally with the University President.

6.2.4 The University President approves, or in the case of buildings or other major capital works, the University President recommends to the USA BOT.

## 7. CONSENT

7.1 The University shall not grant a naming right without the informed consent of the named party or the named party's legal representative.

## 8. NOTIONAL VALUATION OF NAMING RIGHTS

8.1 Notional valuations may be assigned to naming rights possibilities on a case-by-case basis to aid with making decisions about granting naming rights. The Office of the Vice President for Administration and Finance will decide the notional valuation of each naming right. Each case should take in to account market comparisons for naming rights, for which professional advice may be sought. In addition, the PEAR Director shall maintain a schedule of naming rights' notional valuations to assist with new decisions.

## 9. DURATION OF NAMING RIGHTS

9.1 The duration of naming rights shall be as follows:

DESCRIPTION	DURATION
Building	See Annex 3
Parts of Buildings (see list)	See Annex 3
Outdoor Areas (see list)	See Annex 3
Colleges, Centres and Institutes	At least 10 years
Professorial Chairs	At least 5 years
Programs	At least 1 year
Project	At least 1 year
Events and Activities	At least 1 years
Scholarships	At least 4 years
Prizes	At least 1 year
Student Project Support	At least 1 year
Others	Case-to-case basis

## 10. PHYSICAL DISPLAY OF NAMING RIGHTS

10.1 The physical display of the naming rights shall be decided based on the guidelines stipulated by PEAR Office. In the case of buildings, the physical display of the naming rights will take into account the corporate identity of the University and opportunities offered by that building for the University. In cases of Naming Rights in Recognition, plaques or tablets may with the approval of the PEAR Director be installed in buildings in recognition of distinguished members of the University, staff or alumni whose services were identified with the functions of those buildings. Plaques must adhere to a standard agreed to by the PEAR Director.

## **11. TRANSFERABILITY**

**11.1** In this section “parties” includes the legal representatives of the parties.

### **11.1.1 Transferability of Asset, Activity or Academic Position**

**11.1.1.1** Naming rights may be transferred to another asset, activity or academic position by mutual agreement between the parties.

### **11.1.2 Transferability of Named Party**

**11.1.2.1** Naming rights may only be transferred to any other named party by mutual agreement between all the named parties.

## **12. TRADABILITY**

**12.1** Naming Rights in Consideration may be traded by mutual agreement between all the parties. Traded is defined as “to exchange or swap one naming right for another.” For example, when a company changes its name the naming right may be changed or “traded” to reflect the new name.

**12.2** Naming Rights in Recognition may not be traded.

## **13. RENEWABILITY**

**13.1** Naming rights may be renewed by mutual agreement between all the parties.

## **14. EARLY TERMINATION OF NAMING RIGHTS**

**14.1** In the event of this policy and any specific contract entered into being breached, the parties may terminate a naming rights agreement in advance of the scheduled date, under the following conditions:

## **15. TERMINATION BY THE UNIVERSITY**

**15.1** The University reserves the right, at its sole discretion, to terminate naming rights without refund of consideration, prior to the scheduled termination date, should it consider it is necessary to do so to avoid the University being brought into disrepute.

## **16. TERMINATION BY THE NAMED PARTY**

**16.1** The named party may without refund, at its sole discretion, terminate its acceptance of the naming rights prior to the scheduled termination date, in the event that the University directly brings the named party into disrepute, unless as a result of bona fide research, consultancy, teaching or other community service conducted within the bounds of academic freedom.

## **ANNEX 1**

### **Naming Rights Coverage**

#### **1. PHYSICAL SPACES:**

- a. Buildings or parts of buildings such as wings, lobbies, or walls where the identification focuses on the external feature.
- b. Parts of buildings such as floors, pavements, theatres, laboratories, function rooms and classrooms, where the identification deals with an internal feature.
- c. Outdoor areas, such as gardens, ponds, courtyards, quadrangle, sports facilities, gates, ovals, playing fields, roads, or walkways.

#### **2. ACADEMIC ENTITIES AND POSITIONS:**

- a. Schools, centres and institutes
- b. Professorial chairs or other significant academic positions.
- c. Programs and projects.

#### **3. OTHERS**

- a. Events and Activities
- b. Scholarships, prizes and student project support.
- c. Any other facility, equipment, entity, or asset not listed above which may be recommended for naming after consultation with the University's Director, Philanthropic, External and Alumni Relations (PEAR) Office.

**ANNEX 2**  
**Criteria for Assessment**

**TRAFFIC**

<b>10</b>	6,001 pax - up	<b>5</b>	1,001 – 2,000 pax
<b>9</b>	5,001 – 6,000 pax	<b>4</b>	501 – 1,000 pax
<b>8</b>	4,000 – 5,000 pax	<b>3</b>	201 – 500 pax
<b>7</b>	3,000 – 4,000 pax	<b>2</b>	46 – 200 pax
<b>6</b>	2,001 – 3,000 pax	<b>1</b>	1 – 45 pax

**CAPACITY PER PAX**

<b>10</b>	6,001 pax - up	<b>5</b>	1,001 – 2,000 pax
<b>9</b>	5,001 – 6,000 pax	<b>4</b>	501 – 1,000 pax
<b>8</b>	4,000 – 5,000 pax	<b>3</b>	201 – 500 pax
<b>7</b>	3,000 – 4,000 pax	<b>2</b>	46 – 200 pax
<b>6</b>	2,001 – 3,000 pax	<b>1</b>	1 – 45 pax

**AGE (HISTORY)**

<b>10</b>	81 y.o. - up	<b>5</b>	36 – 44 y.o.
<b>9</b>	72 – 80 y.o.	<b>4</b>	27 – 35 y.o.
<b>8</b>	63 – 71 y.o.	<b>3</b>	18 – 26 y.o.
<b>7</b>	54 – 62 y.o.	<b>2</b>	9 – 17 y.o.
<b>6</b>	45 – 53 y.o.	<b>1</b>	0 – 8 y.o.

**PRESTIGE**

<b>10</b>	Global	<b>5</b>	Universitywide
<b>9</b>	Continental	<b>4</b>	Departmental
<b>8</b>	National	<b>3</b>	Organizational
<b>7</b>	Regional	<b>2</b>	-
<b>6</b>	Local	<b>1</b>	-

**DURATION**

<b>10</b>	50 years	<b>5</b>	25 years
<b>9</b>	45 years	<b>4</b>	20 years
<b>8</b>	40 years	<b>3</b>	15 years
<b>7</b>	35 years	<b>2</b>	10 years
<b>6</b>	30 years	<b>1</b>	5 years

**ASSET SIZE**

<b>10</b>	9 – 10 Million	<b>5</b>	4 – 5 Million
<b>9</b>	8 - 9 Million	<b>4</b>	3 – 4 Million
<b>8</b>	7 – 8 Million	<b>3</b>	2 – 3 Million
<b>7</b>	6 – 7 Million	<b>2</b>	1 – 2 Million
<b>6</b>	5 – 6 Million	<b>1</b>	0 – 1 Million