



Campus Administrative Policy

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Applies to:

CU Anschutz Medical Campus

A. INTRODUCTION

In 2015, the University of Colorado Anschutz Medical Campus made a commitment to standardize recognition practices with a particular focus on tangible recognition displayed on campus. The CU Anschutz Office of Advancement partnered with the campus architect and recognition consulting firm Heurista to create consistent standards and guidelines. These guidelines are based on the review and consideration of existing recognition at the CU Anschutz Medical Campus, examples from other regional organizations and best practices among peer institutions nationwide.

The tangible recognition vehicle (benefactor lists, plaques, displays and other means of recognizing a benefactor by name that can include brief storytelling) is only one component of the overall stewardship strategy at CU Anschutz; however, it is the most public and permanent. A strategic approach that provides consistency of process and outcome was warranted. Furthermore, standardization eases the design process, reduces cost and builds benefactor confidence in recognition practices. By providing guidelines, CU Anschutz has been improving upon the awareness of philanthropy and its impact on campus, fostering fairness in recognition practices and promoting efficiency in the design and implementation of benefactor recognition products.

The breadth and depth of educational, research, healthcare, cultural and community engagement programs at the CU Anschutz Medical Campus require a model that allows for creative application of the design standards. These guidelines provide the tools to maintain an appropriate

balance of consistency and flexibility in the design of benefactor recognition components while supporting the CU Anschutz brand and encouraging improved communication with all audiences.

Constructing and managing a consistent program of benefactor recognition and stewardship activities is not a simple task. It requires a carefully planned sequence of activities that are executed without appearing routine from the benefactor’s perspective. The program must be efficient, sustainable and provide sufficient return on time, energy and dollars invested. It should address the unique nature of the community, reflect best practices from similar institutions, and allow sufficient opportunity for growth and change in response to changes within the benefactor community.

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C. POLICY STATEMENT

Scope/Principles

Philanthropy has been defined as “voluntary action to benefit the common good.” In keeping with the goal of promoting CU Anschutz as a coordinated community, the standards presented in this document are recommended for use throughout the campus. They immediately apply to all CU Anschutz benefactor recognition – interior and exterior as well as print and online. Alignment with UCHHealth University of Colorado Hospital, Children’s Hospital Colorado and other entities sharing the campus is encouraged and will evolve over time.

These guidelines are designed to appropriately honor our benefactors. They also protect the values, public image and market position enjoyed by CU Anschutz.

The following principles underlie the CU Anschutz benefactor recognition guidelines:

- Respect for a benefactor’s wishes is important. Benefactor preference will be considered in every case but cannot conflict with the standards and guidelines set forth in this document.
- Conflicts are to be resolved under the supervision of the Benefactor Relations Manager and the Vice Chancellor of Advancement, using this document as a guide. The campus architect is available to provide design support as needed.
- New circumstances may warrant revision or addition to these standards and guidelines.
- Benefactors may request anonymity, in full or in part. Records will be maintained as required to define the limits any benefactor may place on the use of their name. When appropriate, benefactors should be made aware that public celebration of benefactors motivates giving by others, and benefactors should be encouraged to remove an anonymity restriction, to help the university attract additional giving. If the benefactor prefers to remain anonymous, public recognition of the gift with the formal benefactor name listed as “Anonymous” is recommended. This practice best meets the university’s need to publicly communicate the volume of support received.

- Awareness of each benefactor's interests, motivations and history with the institution are key to good stewardship. Accurate recordkeeping and a commitment to accessing current information are crucial. Storytelling about benefactors is a hallmark of the CU Anschutz benefactor recognition program. All content written about a benefactor should be reviewed and approved by the benefactor (or, if deceased, the benefactor's trusted representative) prior to display or publication.
- All recognition and stewardship activities are to be designed with the CU Anschutz brand in mind. Every effort will be made to adhere to the visual and messaging standards that reflect the university's identity and values. Unique logos and themes should be avoided. The CU Anschutz Office of Communications is available to provide graphic design support.
- Publications, print collateral and website(s) are semi-permanent, public mechanisms for recognizing benefactors. Facility-based recognition is a permanent, public vehicle for communicating with the larger audience about one or more benefactors, the program(s) supported and the appreciation for philanthropy's impact at CU Anschutz. Venues for recognition include plaques, lists and groupings of benefactor recognition. Messaging for these displays should assume the broadest possible audience, even if they provide recognition for only one benefactor. CU Anschutz brand standards will be applied in all benefactor recognition venues.
- Strategies within the Benefactor Recognition Standards and Guidelines are specifically intended for the recognition of benefactors providing philanthropic gifts through the CU Anschutz Office of Advancement or the University of Colorado Foundation. Ancillary uses that fall outside the scope of this policy should be approved by the Vice Chancellor of Advancement.
- Consistency based on giving level and category must be maintained.
- Benefactors should not receive naming rights to multiple physical locations for a single gift. If a gift is larger than the minimum gift amount for the location, recognition should be made with a single plaque or display of the size appropriate to the gift.
- Benefactors may receive naming rights for multiple entities as a result of a single gift as long as only one naming is a physical location. For instance, a single gift may name both a laboratory and a research fund associated with it. The gift must meet or exceed the combined minimum for all naming opportunities associated with it.
- A minimum gift amount of \$100,000 has been set for any formal naming opportunity. Namings must correlate to stipulated gift minimums.
- Planned giving benefactors will be recognized by being listed on a graphic next to the wall. Once the full gift is realized, the benefactor will receive a permanent plaque on the wall. The planned giving list will be updated yearly alongside the permanent plaques update. Planned giving benefactors will not be recognized for any level of planned gift.
- Naming of individual items, such as benches and trees, in response to philanthropic giving is prohibited. Existing examples will remain until the named item is removed or moved.
- Benefactors may be recognized on various lists for giving less than \$100,000 as long as the lists do not suggest a naming opportunity.
- It is strongly recommended and preferred that commemorative and/or honorary namings follow this policy, as well as the design/material guidelines in the attached Appendix. Any honorific naming being considered can be brought forth to the CU Anschutz Office of Advancement for consultation and assistance with design.

Regulation

All CU Anschutz philanthropic and honorary naming titles on or related to the CU Anschutz Medical Campus must be approved by the Vice Chancellor of Advancement at CU Anschutz who will take responsibility for formal notification of the president, chancellor and/or Board of Regents, as required.

Naming of major and smaller university facilities is governed by Board of Regents Policy 14J which addresses both the formal name of the entity as well as the circumstances under which the official name may include an honorary naming. The Board of Regents approves naming and honorary naming of academic and research units responsible for continuing education activities, including schools and institutes. Centers, and institutes are established at the discretion of the chancellor; they must have sustainable budget plans and can be given an honorary name with approval from the chancellor. Entities referred to as “centers” with no official funding mechanism are not eligible for honorary naming.

- Additional clarification on the distinctions between entity types is available through the Office of University Counsel.
- Refer to Board of Regents Policy 14J: Naming University Facilities for further detail on the naming of all facilities.
- Refer to University of Colorado System Administrative Policy Statement #1008 (Procedures for the Establishment of Institutes) for a full description of this type of entity and procedures for the establishment and approval of institutes, and to provide for the renaming of existing institutes.

There is no established university policy for the honorary naming of programs, rooms, faculty positions, scholarships or funds. However, the CU Anschutz Medical Campus has adopted the standards and guidelines documented here to provide greater clarity for administration, advancement staff and benefactors.

Value Calculation

Board of Regents policy 14J suggests several models for defining a substantial gift. In order to clarify the definition of substantial for CU Anschutz Medical Campus, the CU Anschutz Office of Advancement has established gift minimums that are recorded in this document. This model will allow individual schools or units to set fundraising goals above the minimums listed. This model emphasizes consideration of existing economic conditions and national naming norms for comparable programs. Any deviation from these minimums at CU Anschutz must be approved by the Vice Chancellor of Advancement.

Inventory

The CU Anschutz Office of Advancement maintains an inventory of all available facility-based opportunities within existing buildings. The inventory may also include projects under design or construction. Recognition locations within buildings existing prior to the date of these guidelines will be negotiated on a case-by-case basis, although recommended locations have been recorded within the benefactor recognition standards and guidelines described herein.

Any new construction project that is funded in part with philanthropic dollars will include an inventory of facility-based naming opportunities within the building as part of the architectural design process. The design team will plan a location for benefactor recognition sufficient to

recognize all opportunities associated with the building. The display(s) planned will require capacity sufficient to accommodate non-facility-based naming opportunity recognition aligned with the schools, departments, clinics or programs that operate within the facility in addition to the list of facility-based naming opportunities in the building. All exterior naming opportunities will be negotiated with the campus architect on a case-by-case basis and require review and approval by the [Design Review Board](#) or designee.

Timing

Timely recognition of benefactors is a hallmark of good stewardship. However, construction schedules, budgets and other practical implications may indicate a staged approach to implementing benefactor recognition.

Future benefactor recognition will be implemented based on the following schedule:

- Gifts of \$10,000,000 or more pledged after 2014 will be recognized within 12 months of the signed gift agreement unless otherwise agreed upon by the benefactor and the CU Anschutz Office of Advancement or pending budget restrictions.
- New construction funded in part by philanthropic dollars after 2014 will install appropriate benefactor recognition within 6 months of the opening of the facility unless otherwise agreed upon by the benefactor and the CU Anschutz Office of Advancement or pending budget restrictions.

Displays to recognize non-facility-based naming opportunities meeting the following criteria have been implemented and will continue to be updated as space and budget allow:

- Research funds above \$100,000 funded in the year 2000 or later. This display has been installed.
- Education funds above \$100,000 funded in the year 2000 or later. This display has been installed.
- All fully funded endowed chairs, regardless of year established. This display has been installed.

Displays will be updated on a regular basis by the Benefactor Relations Team in the Office of Advancement as budget allows.

Individual schools or departments will be required to adopt the new guidelines moving forward for both facility- and non-facility-based recognition. Replacement of existing donor recognition components is not required.

Pledge Completion

Naming opportunities are offered in response to single gifts, although those gifts may be accomplished over multiyear pledged gifts. Benefactors are eligible for naming opportunity recognition as soon as a formal gift agreement is in place. CU Anschutz reserves the right to provide recognition on a schedule that is coordinated with facility and display completion, and the availability of funds to implement planned recognition.

Cancellation of Naming Rights

Only under certain limited situations, naming rights may be retired or revoked.

- The naming of an area is effective for the useful life of the building, facility, program or service, so long as it is used for the purpose for which it was used at the time of the gift as

documented in the fund agreement. At the end of the useful life of the building or facility and/or the cessation of the use in effect at the time of the gift, CU Anschutz may offer the building, area or program for renaming unless otherwise stated in gift documentation.

Named faculty positions and funds are not eligible for renaming.

- In the event of a renaming, recognition of the earlier naming party shall be maintained, although it may be relocated. This public recognition shall include the original benefactor recognition plaque with revisions sufficient to explain the renaming of the area. Lettering identifying a renamed or repurposed location will not be repositioned.
- Under certain circumstances, a naming opportunity may be time limited to provide the necessary flexibility for CU Anschutz to realize change, growth and expansion. Such limitations would be communicated to a potential benefactor as a part of the gift agreement.
- The benefactor holding the naming rights for a given naming opportunity is afforded first right to expand their giving in order to maintain naming rights.
- There are circumstances under which a benefactor will request a name change in permanent recognition components, such as the change of a business name, or a marriage or divorce. Pending these circumstances, CU Anschutz may choose to ask the benefactor to pay the cost of replacement recognition components.
- Under extraordinary circumstances, when the continued use of the benefactor name would compromise the public trust and reflect adversely upon the organization, CU Anschutz reserves the right to remove recognition or rename a building, facility, program, fund or service.
- CU Anschutz reserves the right to remove recognition of any benefactor who is more than 12 months behind on a pledge agreement or who does not complete a pledge. Final recognition will be aligned with the level of gifts received.

University of Colorado Anschutz Medical Campus Benefactor Recognition Standards and Guidelines

Recognition standards and design guidelines are provided within this document for individual interior and exterior recognition signs, grouped recognition displays, benefactor lists, wayfinding, and print collateral. Online recognition can be found at cuanschutzrecognition.org. On this site, benefactors are able to search by their name to locate their recognition on campus.

Other Benefactor Recognition Signage

In keeping with the limitations inherent in any wayfinding strategy, use of benefactor names on the interior or exterior of buildings at the CU Anschutz Medical Campus is intentionally limited. Listing in any wayfinding signage and all outdoor recognition components warrants review by the campus architect who will negotiate review by the University of Colorado Design Review Board. Guiding principles are as follows:

- Only benefactors reaching a certain level in cumulative giving are eligible for building naming at CU Anschutz. These discussions and the gift level must be approved by the Chancellor and Office of Advancement.
- Sign standards for identification, and benefactor recognition on the building exterior and in all freestanding signs identifying the building, are managed by the campus architect and facilities management per the current wayfinding standards.
- Recognition on other exterior signs, including banners, is limited by the existing sign standards.
- Listing on directories occurs at the levels established by wayfinding standards.

- Placing lettering on or in named interior spaces is discouraged, with the exception of the “destination graphics” afforded to naming opportunities of \$10,000,000 or more.

When naming freestanding structures on the CU Anschutz Medical Campus, the official title should include the word “pavilion” or “building” and have a functional designation as part of its name. When adding the honorary name of a benefactor, the title should use the benefactor’s last name only. Foundations and corporations may use formal legal names or benefactor-preferred abbreviations.

Individual schools, colleges, departments, divisions, clinics, programs and units may choose to recognize benefactors below the minimum gift amounts for a naming opportunity. In that circumstance, benefactors will be presented in list *via* cost-effective large-format printing or electronic media that can be easily updated. A list may be combined with naming opportunities within a grouped display. Lists should be submitted to the Benefactor Relations Team in the CU Anschutz Office of Advancement for review and record-keeping prior to printing and/or publication.

Program Strategy – Grouped Unit Plaques

Naming opportunities associated with faculty positions, research funds, programs and scholarships are presented in grouped displays. Facility-based naming opportunities may also be presented in framed grouped units, especially in locations where there is limited public access to the areas named.

These displays are positioned throughout campus in public areas with a high volume of visitor traffic to provide maximum exposure for the benefactor and build awareness of the crucial role of philanthropic support at the CU Anschutz Medical Campus. Examples include:

- Research 1-North Annex First Floor Lobby
- Education 2-South First Floor Lobby
- Anschutz Health Sciences Building Atrium

Program Strategy – Building Naming

Benefactors who have achieved or are being solicited for a certain level in cumulative giving may be offered a building naming opportunity on the CU Anschutz Medical Campus. This process requires close coordination with and approval by the Chancellor’s Office and campus architect, and presentation by the campus architect to the University of Colorado Design Review Board. Building naming opportunities should be discussed and approved on a case by case basis.

Architectural constraints may affect the final design; nevertheless, the following elements will be considered for each location.

- Vehicular-level signage on one or more primary faces of the building. This will include the “block” CU icon, the benefactor’s last name, reference to the functional purpose of the facility and the word “building.”
- Pedestrian-level signage at the primary entry to the building. This will comprise 1” thick aluminum letters no more than 10” high and include the benefactor’s last name, reference to the functional purpose of the facility and the word “building.”
- Standard vinyl signage on doors. This includes the benefactor’s last name, reference to the functional purpose of the facility and the word “building.”

- Standard monument signage, in locations determined by the campus wayfinding plan, including benefactor's last name, reference to the functional purpose of the facility and the word "building."

Building naming signage must also adhere to any current way finding guidelines as established by the CU Anschutz Office of Communications.

Virtual Naming Opportunities Recognition Collateral Overview

"Virtual naming opportunities" are those in which the benefactor is formally recognized through the naming of a faculty position, program, scholarship or other entity that does not have a facility-based location. CU Anschutz is committed to improving recognition on campus for all benefactors and will including permanent public recognition for these benefactors within the framed grouped units. Additional recognition in media announcements, print collateral (including letterhead and business cards) and content may be provided via various websites.

The benefactor will be recognized per the approved standards, which are based on gift amount and include specific material and content guidelines.

The Benefactor Relations Team in the CU Anschutz Office of Advancement will manage content development and layout to ensure consistency with the benefactor recognition standards. The CU Anschutz Office of Communications will be engaged as unusual circumstances arise.

***Celebrating Impact & Generosity* Benefactor Storyboard Program**

To enhance awareness and understanding about philanthropy, the CU Anschutz Office of Advancement has designed a versatile storytelling mechanism, the *Celebrating Impact & Generosity* benefactor storyboard program. This program focuses on the value of the story without regard to gift level and highlights individual, corporate and foundation benefactors. It is designed to celebrate the impact of giving. The CU Anschutz logo will also be incorporated in the display to leverage campus branding.

The current location for this program is the glass display at the entrance to RC2. Additional locations on campus and related storytelling on the website or in other collateral may be considered.

Stories will be developed by the CU Anschutz Office of Advancement, based on recommendations reviewed by the leadership team in that office.

All stories will appear on the wall for 1 year starting in January. Promotion through the storyboards should not be considered a mandatory recognition component for any benefactor.

D. DEFINITIONS

Benefactors: Those who make financial gifts through any fundraising vehicle managed by the Office of Advancement or the University of Colorado Foundation.

Facility-Based Naming Opportunity: A building, portion of a building or outdoor space chosen for formal naming in recognition of a benefactor. Most often, naming opportunities result from a single major gift of \$100,000 or more; gift minimums per opportunity type are detailed within this

document. Building naming's are the exception; cumulative giving of \$50,000,000 and nomination by the CU Anschutz Office of Advancement is required. Recognition components typically include a plaque and other signage components as indicated by the approved standards.

Non-Facility-Based or Virtual Naming Opportunity: A faculty position, program, scholarship or other fund formally named in recognition of a benefactor. Most often, naming opportunities result from a single major gift of \$25,000 or more (gift minimums per opportunity type are detailed within this document). Recognition components typically include a plaque and formal use of the benefactor name in print and online collateral as indicated by the approved standards.

Commemorative Naming: On rare occasions, CU Anschutz entities are formally named in honor of an individual without regard to specific financial gifts. Such naming's require approval by the CU Anschutz Office of Advancement and approval by the CU Anschutz Office of Communications if they involve building naming's or exterior spaces. The naming's may also need approval by the Chancellor and CU Board of Regents.

Gift-In-Kind: Gifts of products or services made in-kind are not eligible for facility-based naming opportunities. (For example, a donation of equipment shall not result in the naming of a laboratory.) However, a benefactor making a gift valued at \$100,000 or more may be listed on a plaque in a grouping with other benefactors.

Sponsorship: Sponsors provide funds for time-limited recognition in conjunction with specific events or programs. Sponsors are not eligible for permanent recognition on campus. The standards listed within this document should not be used for sponsor recognition.

Cumulative Giving Recognition: The CU Anschutz Office of Advancement maintains meticulous records about benefactor giving and is able to report the cumulative giving totals of all benefactors since the creation of the CU Anschutz Medical Campus. In celebration of those benefactors who have reached cumulative giving milestones of levels to be determined, a significant public display will be created. Cumulative giving at these levels indicates a significant and sustained relationship with the university.

Design and Review Support: The design of benefactor recognition involves the coordination of several disciplines. The following resources may help in the writing and design detailing of benefactor recognition communications, including plaques. Support specific to CU Anschutz benefactor recognition is available through the Benefactor Relations Team in the CU Anschutz Office of Advancement.

Typography Standards: The approved typeface for benefactor recognition is Helvetica Neue. It is the featured typeface throughout the University of Colorado system.

CU Anschutz Medical Campus Identity Standards:
<https://www.cuanschutz.edu/offices/communications/brand>

Copywriting Standards: Guidance on grammar, punctuation and style can be found here:
<https://www.cu.edu/university-relations/style-guidelines>

Formal Design Review: Variances from the standards may warrant review by the brand manager,

others on the Communications Team or the Brand Review Board. The Benefactor Relations Team will serve as liaison in these situations.

Location Coordination: All exterior locations warrant coordination with the campus architect, which is managed via the Benefactor Relations Team. The campus architect will serve as liaison to the Design Review Board, if warranted.

Design Review Board: The Design and Review Board is a division of the Budget and Finance Office. Proposed schedule, agenda and minutes are viewable via:

<https://www.cu.edu/budgetpolicy/capital-construction-and-planning-drb-meetings>

Campus Master Plan: Familiarity with the Facilities Master Plan will provide context and supply photos, maps and other tools useful in coordinating locations. The CU Anschutz Medical Campus 2012 Facilities Master Plan - as approved by the University of Colorado Board of Regents on September 17, 2013 - is available for reference via:

<https://www.cuanschutz.edu/offices/institutional-planning/facilities-master-plan>

Required Lists/Audits: Benefactor recognition planning, especially of past gifts, requires reliable reporting on gift details, including gift amount, date and formal name of both the naming opportunity and the benefactor. These lists are pulled and parsed by the Benefactor Relations Team.

Notes

1. Dates of official enactment and amendments:
August 23, 2022: Adopted/Approved by CU Anschutz Chancellor
2. History:
October 2020: The Office of Advancement partnered with the campus architect and recognition consulting firm Heurista to create consistent standards and guidelines. These guidelines are based on the review and consideration of existing recognition at the CU Anschutz Medical Campus, examples from other regional organizations and best practices among peer institutions nationwide.
3. Initial Policy Effective Date: January 1, 2021
4. Cross References/Appendix:
 - *Appendix A: Program Strategy, Process and Details*
 - *Appendix B: Design, Fabrication and Installation*