



FUND MINIMA AND PHILANTHROPIC NAMING POLICY

The UWL Alumni & Friends Foundation ("Foundation") Fund Minima and Philanthropic Naming Policy sets forth the criteria and procedures for the philanthropic naming of academic entities and physical entities of the University of Wisconsin-La Crosse. This policy is informed by UW Board of Regent Policies 4-19 and 19-14 and in conjunction with the UWL Commemorative Tributes Policy.

[Naming of University Facilities and Lands | Board of Regents](#)

[Naming of University Academic Units | Board of Regents](#)

1.0 STATEMENT OF PURPOSE

The purpose of the Named Minimum Endowment and Fund Levels Policy is to:

Ensure that contributions to the UWL Alumni & Friends Foundation resulting in a naming have a significant and sustained impact on UWL's community. They also assist donor relations professionals when working with prospective donors interested in making gifts in furtherance of the objectives of the Foundation and the University. By setting forth clear policies and procedures relating to endowment minimums, this document will guide Foundation staff, University Partners, and volunteers in cultivating and accepting gifts.

The terms set forth in this document are meant to supplement those set forth in the UWL Alumni & Friends Foundation Gift Acceptance & Endowment Policy.

Named endowments and current use pledge commitments create financial stability, allowing the University of Wisconsin-La Crosse a reliable source of vital funding annually to offer support through student scholarships, professorships, chairs, and program support. Consistent with the Alumni & Friends Foundation's Board of Directors Gift Acceptance and Endowment policies, the Alumni Foundation adheres to guidelines set forth in the Uniform Prudent Management of Institutional Funds Act (UPMIFA).

2.0 TERMS DEFINED

Endowment gift: A gift made with donor-directed instruction that the principal be invested permanently. A portion of the investment income is used for purposes restricted and specified by the donor.

Current use gift held as quasi-endowment: A gift designated for current use; however, the Alumni & Friends Foundation directs that the gift be treated similar to an endowment gift (see Endowment Policy 9.0); although, there is no donor-imposed stipulation that requires that the principal be invested permanently. Both income and principal may be used for the specified purpose to provide financial flexibility needed for large initiatives and capital projects.

Current use gift: A gift made for current spending. The gift may be restricted to a specific college, school, department, or program of the university or it may be made without any restriction. In any case, the entire gift is available for spending. The accounts associated with current use gifts are often referred to as “pass-through” accounts.

Academic Entity refers to any position, department, school, college, center, institute, organization, unit, professorship, or that may be named.

Physical Entity refers to any existing or proposed university building, building addition or physical space (interior and exterior) involving university property not named prior to implementation of this policy.

3.0 CONTRIBUTION GUIDELINES

The university offers the opportunity to recognize significant philanthropic support through the naming of academic entities and physical spaces. To ensure a mutually beneficial partnership, the following criteria must be met:

- **Minimum Gift Requirements:** Contributions must meet the established minimum thresholds as outlined in the accompanying tables. These thresholds vary based on the type of entity being named (academic or physical).
- **Formal Commitment:** A written and signed agreement, detailing the charitable commitment, is required to be completed and signed by both the donor and the UWL Alumni & Friends Foundation.
- **Employer Matching Gifts:** Employer matching programs can contribute to reaching the minimum naming. However, the donor remains ultimately responsible for any outstanding pledge balance if matching funds are not received.
- **Fulfillment of Pledge:** The university reserves the right to remove the associated name if the minimum contribution is not fulfilled by the end of the designated pledge period.

Requests deviating from these standard guidelines will require formal review and approval by the UWL Alumni & Friends Foundation Gift Acceptance and the chancellor’s cabinet.

4.0 RECOGNITION AND SIGNAGE

University Advancement will coordinate with Campus Facilities to provide appropriate signage to acknowledge naming gifts for physical entities. The Vice Chancellor of Administration and Finance will oversee and approve all signage for named spaces to ensure consistent aesthetics across campus. They will also coordinate any necessary campus-wide updates related to named spaces.

The university reserves the right to allocate a portion of the gift towards the cost of recognition signage associated with the donor's contribution. Such allocation will be communicated transparently to the donor and will not exceed a reasonable percentage of the total gift amount. The university will ensure that the recognition signage reflects the donor's generosity appropriately and in line with university standards.

In addition to the university-provided signage, units impacted by the naming may, at their discretion, create and install "recognition signage" (e.g., framed biography of the donor) in consultation with the UWL Alumni & Friends Foundation.

The UWL Alumni & Friends Foundation will consult with the donor to ensure alignment with the intent and preferences of the donor are considered and the donor is informed throughout the naming process.

The university reserves all rights of publicity, advertising, and any use of the designated name for promotional, instructional, and advertising materials across all mediums. This includes, but is not limited to, print, film, video, radio, internet, and any other form of communication yet to be developed.

Any individual, corporation or other legal entity for which a UW facility, building or parcel of land is named is prohibited from using the name, logo, or other component of branding of the UW System or any UW institution as a commercial endorsement or for advertising. University exterior or way-finding signage shall not include the logo or other components of external organization branding, with the exception of the corporation or legal entity's name (BOR Policy 19-14)

5.0 GIFT AGREEMENT SIGNATORY PROCESS

To finalize a gift agreement involving naming recognition, the designated space, the gift amount, and, if applicable, the donor's preferred wording for signage within established character limits should be documented. All donor agreements will be signed by the Vice Chancellor for Advancement.

Agreements requiring Universities of Wisconsin Board of Regents approval will be signed by the UWL Chancellor.

Capital Naming and New Funds: Agreements establishing new capital funds with naming recognition will be signed by the Chancellor and the Vice Chancellor of Administration and Finance.

6.0 REVOCATION OF NAMING RIGHTS

The university reserves the right to revoke the designated name from an academic entity or physical entity under the following circumstances, as determined by the University Board of Regents in its

reasonable discretion (BOR Policy 19-14):

- If the donors fail to fulfill their financial commitment as outlined in the initial agreement.
- If the designated name is deemed to be in violation of the law.
- If the donors engage in actions of such severe moral turpitude that it generates negative publicity of a substantial nature and duration, potentially causing significant damage to the University's reputation.

Consequences of Revocation:

- Donations previously made by the donors will not be returned.
- Funds from the original gift may be used to cover necessary and customary expenses associated with renaming the entity.
- Funds already deposited in the designated fund may continue to be used for the originally intended purpose as outlined in the agreement.
- The donors are released from any remaining payment obligations under the initial agreement.

7.0 ARBITRATION

Any circumstances not addressed herein will be reviewed and decided at the discretion of the Vice Chancellor of University Advancement.

8.0 MINIMUM GIFT LEVELS FOR NAMING RECOGNITION

Final naming amounts are the discretion of the chancellor's cabinet, the UWL Chancellor, and the Universities of Wisconsin Board of Regents. The UWL Chancellor reserves final decision authority when Board of Regent approval is not required and may make exceptions in consultation with the cabinet when appropriate.

ACADEMIC ENTITIES		
Naming Opportunity	Endowment Minimum	Current Use Minimum (3-5 years)
School or College: Provides ongoing financial resources to sustain the educational programs, activities, research initiatives, and physical infrastructure of the school or college. This includes essential equipment, structures, and ongoing maintenance, ensuring the college has the necessary resources to fulfill its educational mission and goals. - In cases of permanent naming, it is preferred that 75% of the total gift amount be placed in an endowment for the future benefit of that academic entity. - No more than half of the gift may be in the form of an irrevocable deferred gift. The present value of the total gift commitment should be equal to the required minimum gift.	Endowment funds should generate earned interest equivalent to 5% of the actual or anticipated operating budget. (<i>Operating budget refers to Redbooked budget associated with the unit</i>).	Annual funds should be equivalent to 5% of the annual operating budget.
Department: supports a department at UWL and funds enhanced student, faculty, & staff experiences through fostering a richer educational environment; and elevate the caliber of education by supporting faculty development and curriculum initiatives.	\$5 million	\$200,000
Dean: An endowed deanship supports special programs, and initiatives of the dean of the college for which it is designated and provides discretionary funds for other expenses as appropriate. Administered by the University Provost.	\$5 million	\$200,000
Program: a structured set of courses and requirements leading to a specific degree, certificate, or concentration.	\$2.5 million	\$100,000
Director-Center: Named opportunity for a director or a center or the director of a center. Examples include, but are not limited to, Center for Civil Dialogue & Civic Engagement, Campus Child Center, River Studies. Level of gift determines naming.	\$2 million	\$80,000

Naming Opportunity	Endowment Minimum	Current Use Minimum (3-5 years)
Chair: A named chair supports research, teaching & scholarly development of the endowed professorship holder. Chairs are awarded for three (3) year terms subject to renewal with approval from the dean and provost.	\$2 million	\$80,000
Professorship: An endowed professorship supports research, teaching & scholarly development of the endowed professorship holder. Endowed professorships are awarded for three (3) year terms subject to renewal with approval from the dean and provost.	\$1 million	\$40,000
Series: Examples include, but are not limited to Arts Fest, Distinguished Lecture Series in Physics, etc.	\$1 million	\$40,000
Faculty Fellowship: An endowed faculty excellence fund provides support for leadership development, teaching excellence and research, and scholarly engagement for an outstanding faculty member selected by university leadership. Administered by the Dean of the College or School.	\$500,000	\$20,000
Endowed Scholarship: A named endowed scholarship supports educational expenses of a current UWL student(s).	\$25,000	\$5,000
Endowed Funds: A named endowed fund provides non-scholarship support to a university academic or athletic department, program, unit, etc.	\$25,000	\$5,000
Annual Scholarship/Award: A named annual student scholarship or faculty/staff award		\$3,000

PHYSICAL ENTITIES

The naming of atriums/doorways, and exterior finishes such as bricks, benches, statues, or trees is not encouraged by the university due to university priorities that focus on naming opportunities that provide direct support to UWL students/faculty/staff.

Naming Opportunity	Gift Minimum
Named Internal or External Buildings & Spaces for new construction or renovation: To be funded by current use gifts or pledge commitments in a period of up to five years. Whenever possible, 10% of gift should be placed in an endowment to support ongoing operating and maintenance of the building.	25% of the total cost of the project, if funded by both public and private support. 50% of the total cost of the project if funded exclusively through private gifts.
Other pre-existing minor spaces: Guideline naming amounts for classrooms, laboratories, lecture halls, lobbies, or similar physical spaces will vary according to scale.	Beginning at \$50,000 and scaling based on use of room, size, and prominence on campus will determine the value of the space as determined by the Commemorative Tributes Policy.