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DONOR RECOGNITION AND NAMING RIGHTS POLICY

PURPOSE AND SCOPE

This policy establishes guidelines for recognizing donors at Roseman University of Health Sciences, outlining levels of recognition, naming rights, and associated benefits. It aims to ensure consistent and prestigious recognition opportunities while aligning with the University's mission and values.

The purpose is to create a culture of philanthropy where recognition becomes a hallmark of distinction, fostering donor engagement and long-term support. This policy complements the Donor Relationship Management Policy, Gift Acceptance and Valuation Policy, Gift Reporting Policy, and Endowment Policy, ensuring all donor-related activities are cohesive and transparent.

DEFINITIONS

- a. **Naming Rights:** Opportunities to name physical spaces, programs, or funds in recognition of substantial contributions that meet University thresholds.
- b. **Donor Recognition Circles:** Tiered levels of acknowledgment for donors based on annual giving, cumulative lifetime giving, or specific types of contributions (e.g., planned gifts, in-kind gifts).
- c. **Lifetime Donor Recognition:** Permanent acknowledgment for individuals or entities whose cumulative contributions exceed significant milestones.

OVERSIGHT

- a. The Office of the President retains final approval authority for all naming rights and major recognition initiatives.
- b. The University Space and Facilities Advisory Committee (USFAC) serves as the advisory body regarding the development and management of the physical environment of the campus. Its

main charge includes:

- i. Assigning and managing campus space.
 - ii. Reviewing building and renovation plans.
 - iii. Developing and maintaining campus planning and design standards.
 - iv. Prioritizing minor and major capital requests related to space and facilities.
 - v. Evaluating naming rights proposals to ensure they align with the functional, aesthetic, and physical character of the campus.
- c. The Office of Philanthropy & Alumni Relations (PAR) oversees all aspects of donor recognition, including:
- i. Designing and implementing recognition programs.
 - ii. Reviewing and approving naming opportunities in collaboration with the USFAC and other University leadership.
 - iii. Ensuring compliance with this policy and other related policies.
 - iv. Providing regular updates to University leadership on donor engagement metrics.

NAMING RIGHTS

Naming rights recognize transformative contributions to the University and are governed by this policy to ensure consistency, transparency, and alignment with institutional priorities.

- a. Eligibility and Requirements:
- i. Naming rights are granted for substantial contributions as outlined in the Gift Acceptance and Valuation Policy.
 - ii. All naming proposals must be codified in a gift agreement specifying the donor's intent, the duration of naming rights, and any conditions attached to the contribution.
- b. Duration:
- Subject to reassessment:
- i. Equipment and Items (e.g., medical/laboratory equipment): 1-3 years.
 - ii. Small Spaces (e.g., study rooms, offices): 5 years.
 - iii. Mid-Sized Spaces (e.g., classrooms, labs): 10 years.
 - iv. Large Spaces (e.g., lecture halls, auditoriums): 15 years.
 - v. Buildings and Facilities: 20 years.
 - vi. Programs: 10 years
 - 1. Naming rights for programs, including those established through transformative gifts, shall be granted for an initial term of ten (10) years. This term reflects the evolving nature of programmatic initiatives.
 - 2. In cases where a program, such as one established with a multi-million-dollar gift, has demonstrated enduring value and strategic importance over time, the University may consider converting the naming rights to

perpetual recognition following a comprehensive review by the Office of the President and the University Space and Facilities Advisory Committee.

- c. Perpetual Recognition: Perpetual recognition will be reserved for contributions that have a demonstrable and enduring impact on the University's mission. This includes:
 - i. Lifetime donor contributions meeting or exceeding the thresholds defined under Lifetime Donor Recognition (e.g., Founders Society and Legacy Society levels).
 - ii. Endowed programs, scholarships, and funds that are sustained by ongoing financial support and continue to drive the University's strategic initiatives.
 - iii. Major facilities or buildings established or significantly enhanced through transformative gifts.
 - iv. Perpetual naming rights and recognition for such contributions shall be approved by the Office of the President, in consultation with the University Space and Facilities Advisory Committee, to ensure alignment with the long-term vision and legacy of the University.

- d. Approval Process
 - i. All proposals related to naming rights must be reviewed by the USFAC for alignment with University standards and priorities.
 - ii. Recommendations from the USFAC are submitted to the President for final approval.
 - iii. Naming rights for significant contributions (\$1 million or more) may require additional review and approval by the Board of Trustees.

DONOR RECOGNITION

Donor recognition is structured around annual giving levels, cumulative lifetime contributions, and specific types of planned or in-kind gifts. Each circle offers tailored benefits to create meaningful engagement and long-term relationships, which will be included in Agreement letters.

- a. Monthly Giving:
 - i. **1999 Society**: Commemorating Roseman's founding year and honoring those who invest in its continued success through monthly giving.

- b. Annual Giving Levels:
 - i. **Trailblazer Circle (\$1,000-\$4,999)**: Recognizing donors who pave the way for future generations of healthcare professionals.
 - ii. **Heritage Circle (\$5,000-\$24,999)**: Celebrating donors who continue the legacy of excellence and commitment to healthcare education.
 - iii. **Dean's Circle (\$25,000-\$99,999)**: Celebrating donors who drive progress through transformative gifts that support scholarships, research, and academic programs.
 - iv. **Discovery Circle (\$100,000-249,999)**: Recognizing donors who serve as the foundation of Roseman's success, ensuring long-term impact on students and faculty.

- v. **Healing Hands Circle (\$250,000-\$999,999)**: Honoring those who elevate Roseman’s mission to new heights through significant philanthropic investment.
 - vi. **Visionary Circle (\$1,000,000-\$2,499,999)**: Recognizing forward-thinking donors whose gifts shape the University’s future and establish lasting change.
 - vii. **Innovation Circle (\$2,500,000-\$4,999,999)**: Honoring supporters who create new opportunities in healthcare education and community impact.
 - viii. **Transformation Circle (\$5,000,000-\$9,999,999)**: Recognizing donors whose philanthropy creates transformational and measurable advancements in healthcare and student success.
 - ix. **Chancellor’s Circle (\$10,000,000-\$24,999,999)**: Honoring donors whose generosity leads to fundamental changes in healthcare education, innovation, and infrastructure.
 - x. **President’s Circle (\$25,000,000+)**: Recognizing the most distinguished donors whose visionary support secures the future of Roseman University.
- c. Lifetime Giving:
- i. **Founders Society (\$500,000+ cumulative lifetime contributions)**: Honoring those whose sustained generosity has permanently shaped Roseman’s growth and impact.
 - ii. **Legacy Society (\$1,000,000+ cumulative lifetime contributions)**: Recognizing donors whose lifetime commitment ensures the continued advancement of Roseman’s mission.

REVIEW AND REVISION

This policy will be reviewed annually by the Office of Philanthropy & Alumni Relations to ensure its continued relevance and effectiveness. Amendments may be made as necessary to address evolving best practices in donor relationship management, respond to organizational changes, or reflect new University strategies and priorities. All revisions will be communicated to University personnel, and training will be provided to ensure compliance with updated policies as necessary.

All Revision Dates

07/2025

Approval Signatures

Step Description	Approver	Date
Administrative Council	Renee Coffman: President	07/2025

Unit Head Approval

Geena Mattox: Vice President
of Philanthropy and Alumni
Relation

07/2025

Initial Review

Alyssa Sherick: Senior Director,
Philanthropy & Alumni
Relations

07/2025

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