Naming Opportunities
October 20th, 2016

The University of Wisconsin Foundation and Alumni Association (UWFAA) and the UW-Madison have developed the following general guidelines for determining naming gift levels and space values based on research of industry-wide best practices. Following a set of standards for determining naming gift values helps to ensure consistency across the University. This document provides guidance on the types of gifts (i.e., outright, pledges) that meet general standards in support of naming opportunities, and guidelines for the gift levels generally required for specific naming opportunities and how to address any proposed variances from these standards. Some significant University assets – specifically lectureships, fellowships, professorships, deanships and chairs (Appendices A and B) – have financial levels predetermined by UW-Madison guidelines. Others, such as buildings and grounds or colleges and schools have no predetermined levels. This section provides guidance on objectively determining the giving level standards for these undetermined naming opportunities.

Gift Types
Only current, outright gifts and pledges are accepted for the naming of UW-Madison spaces or programs, including:

- Colleges and schools;
- Academic programs, centers and institutes; and
- Buildings, significant portions of buildings, grounds, physical structures, streets, outdoor spaces and amenities.

If a pledge is made, the timing of payments should coincide with the timing of the implementation of the building project so that the majority of the gift is paid prior to completion of construction. As a rule, bequests or revocable future gifts are not eligible for a naming opportunity; however, in some unusual circumstances an exception can be made for irrevocable estate gifts when combined with an appropriate amount of outright gifts that will satisfy the financial requirements at the time of the pledge. For each project, units should ensure that pledge payments conform to Facilities Planning and Management cash flow timelines.

Colleges, Schools, Academic Programs, Centers and Institutes
The naming of a college, school, academic program, center or institute will require significant consideration in the decision-making and approval process. As a rule of thumb, the level of
naming gifts must be transformational to the college, school, program, center or institute, and will be evaluated and approved on a case-by-case basis by the Chancellor’s Office.

Standard for Gifts to Name Colleges, Schools, Programs, Centers or Institutes
Any unit looking to name a college or school should look at peer institutions of similar stature and let the market value determine what a reasonable level would be with the prerequisite that the gift needs to be transformational to the unit. All proposals for naming of this magnitude must be approved by the Chancellor’s Office.

Buildings and Grounds
A name proposed for a major new facility in recognition of a gift may be considered when the gift represents a substantial component of the project’s total cost. In some cases, buildings or grounds projects may be named in honor of a significant donor to other initiatives (i.e. honoring significant lifetime giving to student support or faculty chairs by naming a building). These cases require a thorough explanation of the reasoning in order to ensure consistency and equity for all donors (see Appendix C for examples). All proposals for naming of this magnitude must be approved by the Chancellor’s Office.

Standard for Gifts to Name Buildings and Grounds Projects
To name a building or grounds project in honor of a significant donor, the gift should represent at least 50 percent of the private dollars needed to complete the project or approximately 20 to 25 percent of the project’s total cost for project’s receiving any amount state funding.

Approval Authority for the Naming Opportunities Identified Below
In most circumstances naming of rooms and smaller spaces that are not covered above or in the Board of Regents naming policy outlined in Appendix D will be approved by the dean of the school or college responsible for the spaces. In some instances approval authority may be required by more than one dean or by a vice chancellor if the room or space is under more than one school’s or college’s authority.

Rooms and Other Smaller Spaces
Naming of smaller spaces such as rooms, lobbies, labs, etc. can be an effective way to showcase private fundraising for new facilities or initiatives. These types of giving opportunities require significant upfront planning and an analysis of the entire building or area within which the donor will name a smaller space.

The total value of all potential named spaces should be approximately 150% of the overall fundraising goal, including the building naming. For example, if the total private fundraising goal for a building expansion is $5 million, then the sum of all the gift options for named spaces (lobby, labs, auditoriums, rooms, studios, etc.) should be approximately $7.5 million. This practice allows for future fundraising opportunities, helps manage donor expectations, and provides donors with more choices.

Spaces with high visibility and emotional impact such as lobbies, auditoriums, and classrooms typically should range between 5% and 10% of the gift dollars needed to complete the entire project depending on a variety of factors such as location and appeal as a naming opportunity. For particular projects, gifts either below or above this range may be warranted.
Naming of Existing Spaces
Fundraising opportunities should be considered for the naming of existing facilities to provide additional funding for programmatic support, future renovations, and programs that maximize the use of the facility.

Although exceptions may occur, optimally the target gift amount should include expendable funds at 150% of required expenditures for the project plus endowed monies that can be used for ongoing programmatic support of the space or priority initiatives as determined by the campus partner.

Process for Discontinuation of Name for a UW-Madison Space or Program
Naming recognition shall remain in effect during the existence of the space or program and may be subject to subsequent reconsideration by the college/school/department in extraordinary circumstances if, in the sole discretion of the college/school/department, the prior approved naming may reflect negatively or adversely upon or cause embarrassment to the University or college/school/department, the donor is no longer in compliance with the memorandum of understanding, or the prior approved naming violates University policies or procedures.

Other Opportunities
Other opportunities for naming significant University assets may arise that have not been covered in this guidance document. In these cases, please contact the UWFAA President’s Office for assistance.

All proposed namings are subject to applicable University policy. For more detailed reference about naming UW-Madison buildings, please see the Board of Regents Policy on Namings of University Facilities and Lands (Appendix D)
The University of Wisconsin-Madison and the University of Wisconsin Foundation Chairs and Professorships Funding Guidelines

Updated November 2016

Recommended Funding Levels

<table>
<thead>
<tr>
<th>Position</th>
<th>UWF proposed minimum levels</th>
<th>Option for term awards</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ENDOWED</td>
<td>EXPENDABLE</td>
</tr>
<tr>
<td>Deanship</td>
<td>Market-based, requires chancellor’s approval</td>
<td>N/A</td>
</tr>
<tr>
<td>Distinguished Chair</td>
<td>$3M</td>
<td>$150k for 5 years ($750k total)</td>
</tr>
<tr>
<td>Chair</td>
<td>$2M</td>
<td>$100k for 5 years ($500k total)</td>
</tr>
<tr>
<td>Professorship</td>
<td>$1M</td>
<td>$50k for 5 years ($250k total)</td>
</tr>
<tr>
<td>Bascom Professorship*</td>
<td>$500k</td>
<td>$25k for 5 years ($125k total)</td>
</tr>
<tr>
<td>Faculty Fellow</td>
<td>$250k</td>
<td>$15k for 5 years ($75k total)</td>
</tr>
</tbody>
</table>

*Note: Because the principal in each of the Bascom Professorship funds varies considerably, the income generated from the endowment for each professorship must provide a reasonable income to be used as an annual allocation for supplies, research assistance, travel and other support for teaching and scholarly activities. The salaries of the “Name”-Bascom Professors are therefore funded through the University’s normal sources. If sufficient income is generated, the Bascom Professorship funds may be used to support a temporary base adjustment to the professor’s salary if approved by the respective Dean. The maximum TBA is set at $5,000 plus fringes.

Expendable awards will be permitted for five-year periods since this would be an option for some donors who would not be capable of making a gift that would create an endowment. A number of faculty fellow slots were funded by expendable gifts.

The new language for a campus-wide guideline on the use of funds is as follows:
For new professorships or chairs with minimum endowments set at the $500K level or higher, the campus expectation is that normally, a minimum of 50% of the expected annual income generated by the professorship or chair will provide compensation support, and 50-66.7% may be considered within the normal expected range for compensation support. The portion not allocated to compensation support may be used to provide a non-lapsing annual flexible fund allocation to help defray the professor’s approved research and professional expenses.

Below is a table that simulates the consequences of using 50% and 66.7% for compensation support. Note that the policy allows exceeding the 66.7% level for compensation.

**Use of Funds within Expected 50-66.7% Compensation Support Range**

<table>
<thead>
<tr>
<th>Type of Chair or Professorship</th>
<th>Expected Annual Income</th>
<th>Compensation Support @ 50%*</th>
<th>Compensation Support @ 66.7%*</th>
<th>Balance available for “flex fund” use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinguished Chair ($3M minimum)</td>
<td>150K</td>
<td>75K</td>
<td>100K</td>
<td>50-75K</td>
</tr>
<tr>
<td>Chair ($2M minimum)</td>
<td>100K</td>
<td>50K</td>
<td>67K</td>
<td>33-50K</td>
</tr>
<tr>
<td>Professorship ($1M minimum)</td>
<td>50K</td>
<td>25K</td>
<td>33K</td>
<td>17-25K</td>
</tr>
<tr>
<td>Professorship ($0.5M minimum)</td>
<td>25K</td>
<td>12.5K</td>
<td>15K**</td>
<td>10-12.5K</td>
</tr>
</tbody>
</table>

*Note that “compensation support” includes the fringe benefits costs of the amount of salary replaced. The formula for determining the amount available for salary replacement is Amount of Compensation Support x 0.7092. For example, at a fringe benefit rate of 41% (2012-13 rate), $100k compensation support means that 70.92% ($70,920) of the faculty member’s salary will be funded by the professorship and approximately 29.08% ($29,080) will be used to pay fringe benefit costs.

**Adjusted to 60% maximum in view of low minimum threshold level for endowment**
Graduate Fellowship Endowment Naming Opportunities

- An endowment of $1 million or more provides a **Distinguished Graduate Fellowship**. This is the most prestigious fellowship level and is typically awarded to a first-year student for recruiting purposes.

- An endowment of $800k or more provides a **standard Graduate Fellowship**. Departments decide how it is implemented (9-month, 12-month dissertator, etc.)

- An endowment of $600k provides a **Partial Graduate Fellowship** that can be awarded to grad students at any level, most typically incoming students.

- An endowment of $400k provides a full **Dissertator Fellowship** or a **Graduate Student Award** for a pre-dissertator. In some cases, departments may decide to offer multiple Graduate Student Awards based on current needs.
University of Wisconsin System
Agency Request for Board of Regents Action
June 2011

1. **Institution**: University of Wisconsin-Madison

2. **Request**: Requests the naming of the newly constructed addition and the existing School of Human Ecology building located at 1300 Linden Drive, as the **Nancy Nicholas Hall**.

3. **Summary and Background**: This request is in accordance with the University of Wisconsin Board of Regents policy 19-14 which requires that every request to name a facility after a person be brought to the Capital Budget and Planning Committee for approval. The campus has approved this request.

Nancy Johnson Nicholas was born in Madison, where she later graduated from West High School. Following the example of her father, Silas Johnson; mother, Kathryn Linden; uncle, John M. Linden, and aunt, Laura Linden, Nancy Johnson Nicholas entered the University of Wisconsin where her older brother, Silas (Hap), was also a student.

Nancy Johnson Nicholas graduated from the University of Wisconsin-Madison in 1955 with a degree from the School of Home Economics, then a unit within the College of Agriculture. While at the university, she pledged to the Kappa Kappa Gamma sorority and married Albert “Ab” Nicholas in 1952.

The Johnson family continues to have strong ties to the University of Wisconsin-Madison. Nancy and Ab Nicholas have three children—Lynn, Susan, and David, all University of Wisconsin-Madison alumni, as is their granddaughter who graduated with a major in art history in 2008. Both Lynn and David Nicholas are involved in the family's investment company, the Nicholas Fund. Two other grandchildren are currently students and members of the fourth generation of the Johnson family to attend the university.

Nancy and Ab Nicholas have supported multiple University of Wisconsin-Madison programs, including the Athletic Department, the School of Business, and the Carbone Cancer Center. Beyond the University of Wisconsin-Madison they have directed their philanthropy to a number of projects in the Milwaukee area.

In 2004, Nancy Johnson Nicholas gave a lead gift of $8 million to the School of Human Ecology for an addition to and repurposing of its building. At that time, she noted,

“I believe in the School of Human Ecology's mission of enhancing the quality of life for people in all economic situations. I'm impressed with their curriculum.”
“The education that students receive is topnotch, but the facilities make it very difficult for everyone involved,” she says. "Helping to create a new learning environment under one roof that will benefit the students, the faculty, the staff and the collections is exciting.”

Naming the building the **Nancy Nicholas Hall** is an entirely appropriate recognition of this deeply generous gift. This naming also acknowledges Nancy Johnson Nicholas’ legacy in valuing the role of the School in enhancing the quality of people’s lives through higher education and honoring the importance of the University to the State of Wisconsin.

In recognition of the Johnson-Nicholas family's remarkable life-long commitment to the UW-Madison, the School of Human Ecology proposes that the new complex be named Nancy Nicholas Hall.
The University of Wisconsin System
Agency Request for Board of Regent Action

December 2014

1. **Institution**: University of Wisconsin-Madison

2. **Request**: Request the naming of the new Music Performance Center the “Hamel Music Center”

3. **Summary and Background**: This request is in accordance with University of Wisconsin Board of Regents policy 19-14 which requires that every request to name a facility after a person be submitted to the Capital Budget and Planning Committee for approval. The requested naming is a stipulation of a major gift made in support of this project. The campus has approved this request.

George Hamel (BA ‘80 Communication Arts) and his wife Pamela are longtime friends of the UW-Madison. Mr. Hamel is a member of the College of Letters & Science’s Board of Visitors and sits as well as on the UW Foundation Board and has been a member of the Chancellor’s Advisory Council. Mr. Hamel currently serves as the CIO at ValueAct Capital Management, which he co-founded in 2000. Previously he was a Partner at Blum Capital Partners and before that at Private Capital Management, Inc. He was also the President of Carnes Capital Corporation and Signet Investment Corporation and was a Financial Consultant at Merrill Lynch. Among other philanthropic gifts, George Hamel and his family have funded the Hamel Family Letters & Science Faculty Fellow award and the Hamel Family Digital Media Lab in the Department of Communication Arts.

More recently, Pamela Hamel has served as co-chair of the School of Music’s Board of Visitors. In 2008, the Hamel family provided the lead gift to fund the new $21.8 M School of Music Performance Center, the first of a three-phase building project to replace the School’s performance and teaching spaces currently located in the outdated Mosse Humanities Building. The proposed Hamel Music Center will house spaces critical to the School of Music’s curricular and performance needs: a 315-seat recital hall that will become a state-of-the-art laboratory for student and chamber music performance; a rehearsal space that will accommodate 100-student musicians, both majors and non-majors, engaged in large ensemble instrumental activities; an attractive and welcoming lobby that will serve as its own event space; and, modest support spaces for building management.
Located on the corner of Lake Street and University Avenue and adjacent to the Chazen Museum of Art, the proposed Hamel Music Center will serve as a gateway building to the campus. Under design by the internationally-renowned firm of Holzman Moss Bottino Architecture, the Hamel Music Center will feature distinctive design elements that underscore its position of opening the arts to the larger Madison and UW-Madison communities. The building’s design complements the Chazen Museum of Art and its distinctive courtyard, and its placement makes the building ready to accommodate the next phase which will consist of a 700-seat state-of-the-art concert hall.

This naming opportunity appropriately recognizes the extraordinary generosity of the Hamel Family and their continuing investment in the curricular programs of the arts and humanities at the UW-Madison.
Regent Policy Document 19-14
Naming of University Facilities and Lands

Scope
This policy applies to the naming of facilities, buildings, and land owned or otherwise controlled by the University of Wisconsin System Board of Regents.

Purpose
The purpose of this policy is to protect the assets and reputation of the UW System by providing criteria to be applied when naming a building, a facility that constitutes less than a building, and land within the campus boundaries. In addition, the policy clarifies expectations as related to the continued recognition for previously named buildings, facilities, and land.

Policy Statement
It is the preference of the Board of Regents to commemorate individuals’ contributions to academic excellence through the naming of scholarships, programs, professorships, and other similar actions. However, the Board recognizes that, from time to time, there may be a desire to name university facilities or portions of the university’s buildings or land after an individual or individuals.

Naming of an entire building is subject to prior approval by the Board of Regents. A request to name or dedicate a building shall be made by the chancellor of the institution. A chancellor shall submit support for such a request, demonstrating consideration of the factors below, to the UW System Office of Capital Planning and Budget for review. Any proposed naming agreement shall also be reviewed by the UW System Office of General Counsel.

The chancellor of each institution is delegated the authority to name:
- facilities, when the naming involves less than an entire building, such as rooms, wings, or exterior amenities; and
- parcels of land.

For all namings under this policy, the following factors shall be considered:
1. Whether the individual has promoted the purpose and mission of the UW System as expressed in s. 36.01, Wis. Stats.;
2. Whether the reputation of the individual may reflect negatively or adversely upon the UW System or a UW System institution;
3. Whether the individual is in compliance with all agreements with the UW System or a particular UW System institution;
4. Whether any existing agreements prohibit changing or adding a facility name;
5. Whether there is a plan for continued recognition of the individual for whom a building, facility, or land was previously named. A plan for continued recognition is required unless an institution can demonstrate why such recognition is no longer needed. Examples of continued recognition include such methods as a plaque, an appropriately placed monument, or incorporation of a cornerstone; and
6. Whether the individual was employed by the UW System or has served as an elected or appointed public official. Normally, a waiting period of at least five years must have elapsed from the time the individual’s UW employment ended or the individual left public office. Exceptions may be considered under certain circumstances, including when:
   a. The individual is no longer living; or
   b. A gift requests the naming.

Oversight, Roles, and Responsibilities
The Board of Regents is responsible for the physical assets of the UW System and for considering requests to name an entire building.

The UW System Office of Capital Planning and Budget shall ensure all of the requirements of this policy are met prior to a chancellor’s submitting a request to name a building to the Board of Regents.

Related Regent Policies and Applicable Laws
- Regent Policy Document 19-5, Authorization to Remove Unneeded Structures


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