

London Public Library
Naming Recognition Policy

Effective: March 24, 2022
Next Scheduled Review: March 19, 2026

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1.0 BACKGROUND INFORMATION

London Public Library (the “Library”) has a long history of naming branches by the geographic location. Library branches were also named after former Library Chief Librarians: Stanley Beacock, W.O. Carson, Richard Crouch and Fred Landon.

The Library welcomes the opportunity to recognize significant philanthropic Gifts or to honor individuals or organizations for distinguished service to the Library or society in general.

This policy provides direction for ensuring the appropriate benefactor recognition of the following:

- buildings or substantial parts of buildings (wings, Rooms, Service Areas, labs) or other locations in the Library, such as lobbies and common areas;
- programs of research, teaching, or service;
- In-Residence or special lecture series;
- prizes and other awards and funds;
- significant collections of local historical value donated to the Library’s London Room;
- cultural property (i.e., collections of art);
- Contributions of program-related equipment;
- green space, sitting areas, bicycle and walking paths and streets; and,
- other entities the Library may from time to time see fit to name in order to recognize Gifts and/or Contributions.

2.0 PURPOSE

The purpose of this policy is to define the process that governs the recognition of benefactors to the Library. The naming of a building, Room, Service Area, activity, or program reflects the importance of the benefactor to the realization of the Library’s Purpose, Values and commitment to Anti-Racism and Anti-Oppression. In return, the benefactor’s name can add prestige to the building, Room, Service Area, activity or program.

This policy formalizes benefactor recognition in order to provide:

- appropriate public recognition and consistent institutional appreciation of major donors;
- public evidence that the Library enjoys considerable external support and encourages others to invest in the Library’s mission and vision;
- appropriate utilization of the limited number of naming opportunities;
- clear guidelines for those involved in discussions with donors; and,
- facilitation of increased and ongoing support from existing supporters.

3.0 DEFINITIONS

- **Contribution:** means a transfer of property that does not meet the definition of a Gift or donation. A Contribution is often a business expense for the donor, such as a Sponsorship opportunity and can include proceeds of sales and other business activities, lotteries, raffles and auctions. With a Contribution, the donor is not entitled to a charitable donation receipt for income tax purposes.
- **Endowed Gifts:** means donations made to the Library on the understanding that the principal amount of the donation will be invested for a minimum 10-year period, with the interest earnings to be used to advance specific purposes of the Library, such as the establishment of an In-Residence, the funding of a particular program or activity, or a Contribution to the Library's Highest Priority Needs (HPN) Endowed Fund.
- **Endowment Agreement:** is a document drawn up by the Library for the donor's signature that outlines the particulars of an Endowed Gift. The Endowment Agreement defines what Gifts qualify for the fund, and includes a sunset clause in the case of the demise of the Library.
- **Fair Market Value** is the highest price, expressed in dollars, that a property would bring in an open and unrestricted market, between a willing buyer and a willing seller, who are both knowledgeable, informed and prudent, and who are acting independently of one another.
- **Gift:** means the voluntary transfer of cash and Gifts-in-Kind, from an individual, industry, foundation, or other source, to the Library for either unrestricted or restricted use in the operation of the Library. A Gift may be monetary (cash, cheque, credit card, payroll deduction) or non-monetary (securities, life insurance, real property, or personal property). Gifts, also referred to as donations, must be made without expectation of tangible return. With a Gift, the donor is entitled to a charitable donation receipt for income tax purposes.
- **Gifts Held in Trust:** means funds donated to the Library that are not used immediately. The funds are held in a Library trust fund until they are required to support the Library. Management of Library funds is governed by the Library Board's *Investment Policy*.
- **Gifts-in-Kind:** means non-cash Gifts. They cover items such as artwork, equipment, securities, and cultural and ecological property. A Contribution of service, that is, of time, skills or efforts, is not property and, therefore, does not qualify as a Gift or Gift-in-Kind for the purposes of issuing official donation receipts.
- **Pledge:** means a commitment of a Gift given over a predetermined time frame.
- **Room:** means a discrete space within a Library facility and includes, but is not limited to, theatres, auditoriums, meeting Rooms, study Rooms, program Rooms and outdoor spaces, such as reading gardens.
- **Service Area:** means a discrete space within a Library location not enclosed by walls, such as a children's area, computer labs, etc.

- **Significant Real Property:** means Library centres, sites or buildings that are prominently visible from neighbouring adjacencies and surrounding municipal streets; or levels, wings or Rooms within Library buildings that are highly noteworthy to or frequently accessed and used by the community-at-large (e.g., theatres), whether owned or leased by the Library.
- **Sponsorship:** means a mutually beneficial business exchange between the Library and an external organization. A Sponsorship Contribution is made under a contract (implied or explicit) and generally involves a significant benefit to the donor in terms of advertising and promotional value.

4.0 PRINCIPLES

4.1 Naming Opportunities

Decisions to name entities shall be compatible, to the extent reasonably ascertainable, with the Library's Purpose and Values and in alignment with the Library's Strategic Plan.

The following general principles apply to all namings.

- 4.1.1 The naming may be approved in the name of a donor, in the name of a third party at the request of the donor, or to honor an individual or organization for distinguished service to the Library or society in general.
- 4.1.2 The naming may be approved to recognize a current expendable Gift, Endowed Gift, or Gift-in-Kind. Funding may extend over an agreed length of time, and such namings may be in perpetuity or time limited.
- 4.1.3 The naming may be proposed in recognition of planned Gifts (bequests), in which case, the naming will be submitted for approval when the Gift is realized.
- 4.1.4 The naming should enhance the profile and image of the Library. No naming will be approved or (once approved) continued if it will call into serious question the reputation of the Library as a respected public institution.
- 4.1.5 The naming should be in accordance with the Library's *Fund Development Gift Acceptance Policy*.

In cases where philanthropic Contributions include a specific naming opportunity, the recognition signage will follow the generally accepted Library standards regarding size, placement, etc. These Contributions will be distinguished from non-philanthropic partnership agreements, which may have a branding or co-branding component. Naming recognition is determined by the terms of the Contribution agreement.

The approval of a naming opportunity will not result in significant additional costs for the Library, excluding the Library's approval process, without prior approval.

Financial Services will maintain an inventory of all approved benefactor namings.

5.0 LIMITATIONS TO NAMING OPPORTUNITIES

5.1 No naming opportunity shall be approved if it:

- 5.1.1 is likely to have a negative impact on the image or reputation of the Library;
- 5.1.2 infringes on the integrity of the Library or could be deemed to imply the Library's endorsement of a partisan political or ideological position, or a commercial product (this does not preclude naming in the name of, or in honour of, an individual who has, at one time, held public office, or in the name of a sole proprietor, partnership or corporation that manufactures, provides or distributes goods and services, and has made a philanthropic Contribution);
- 5.1.3 is in honour of a staff member who remains in the full-time employment of the Library (honorary naming or distinguished naming may be considered and approved on a case-by-case basis by the Library as outlined in Section 7.0).

6.0 ADDITIONAL NAMING CONSIDERATIONS

- 6.1.1 Gifts received that qualify for Gift-matching programs may be considered for a naming opportunity equal to the value of the Gift plus the matching funds leveraged up to a maximum 4:1 match. Recognition in donor listings will occur at the level of the donor's actual giving.
- 6.1.2 Namings will be independent of all appointments and program decisions.
- 6.1.3 No corporate logos will be used for recognition purposes on buildings, signs, donor walls or in association with any materials, unless proposed by the Library and subject to the approval process for namings.
- 6.1.4 Priority will be given to naming buildings after their geographic location – either the community or the street location where situated.

7.0 HONORIFIC NAMES

Before submission for approval, proposed honorific namings (for non-financial Contributions) must be reviewed by the CEO and Chief Librarian, in conjunction with the Library Board, to ensure opportunities for significant philanthropic Contribution are not eliminated by the honorific naming.

In some circumstances, namings may be approved that honor outstanding service by former or retired Library staff, subject to the review outlined above. At least two years must have passed since their separation from the Library.

8.0 CHANGES TO APPROVED NAMING OR USE OF ENDOWMENT FUNDS

- 8.1** If, through the passage of time, the Library, or the needs of society, could be better served by altering any naming, or changing the use of any named endowed fund, the Library will consult with the donor, heir or designated successor. If no such contact is possible, the Library will make the change, adhering as closely as possible to the donor's original intent.
- 8.2** When a named facility has reached the end of its useful life and will be replaced or substantially renovated, the replaced or renovated facility may be renamed in recognition of a new donor or honouree. If the donor's naming term is not complete (the naming term is 10 years for all assets, except for the naming of a branch and applicable honorific naming opportunities), the Library shall provide the donor with an alternative naming opportunity of comparable value for the balance of the naming term. Appropriate recognition of earlier donors or honourees will be included in the new, renovated or redeveloped facilities at the discretion of the Library.
- 8.3** A benefactor may request a change in a naming if, for example, a corporate donor has changed its name, or an individual donor has changed his or her name. The Library may request that the benefactor bear any associated expenses with the change, such as a change to signage.
- 8.4** Changes to namings must be submitted through the same approval process as for the original naming.

9.0 REMOVAL OF NAMES

Notwithstanding any other provisions in this policy or other policies, a benefactor name for a supported project, will not be approved, or if approved, will be removed, if the name may undermine the reputation of the Library. Ultimate authority to reject, revoke approval of, and/or remove an approved name rests with the Library Board on the recommendation of the CEO and Chief Librarian.

10.0 DEVELOPMENT OF NAMING OPPORTUNITIES

10.1 General

- 10.1.1 Namings will be considered at an appropriate value, obtained by review of best practices, recent namings at the Library, and similar institutions across North America or elsewhere as relevant.
- 10.1.2 The Library shall mutually agree on a comprehensive list of naming opportunities during a campaign or otherwise.
- 10.1.3 Every 3 years, or more frequently if required, the Library shall review the naming opportunity evaluation to ensure listed value reflects the Fair Market Value of the naming opportunity

- 10.1.4 It is the responsibility of Financial Services to determine the appropriate Gift level for namings, beginning at a minimum of \$10,000.
- 10.1.5 Naming opportunity values for new or existing facilities, programs, Rooms, and Service Areas shall take into consideration the function, usage, size, marketability and financial requirements (replacement and/or operational costs) of the opportunity.
- 10.1.6 All naming opportunities shall be preliminarily approved by Financial Services, in consultation with the CEO and Chief Librarian.
- 10.1.7 The Library Board shall approve the naming:
- i) of Significant Real Property;
 - ii) included in the title of a major Library organizational unit; and/or,
 - iii) where such naming is in recognition of a Gift with a value of \$250,000 or more.
- 10.1.8 A decision to erect a building to establish a branch or facility is to be made on the basis of the usual criteria, and approved in the usual manner, as prescribed by the Library Board.

11.0 TYPES OF NAMING OPPORTUNITIES

11.1 Buildings and Building Components

- 11.1.1 For the naming of a **new or existing building**, a Contribution in the range of 30% of the total private sector support would be required. The Library would also encourage the benefactor to consider endowing the maintenance costs.
- 11.1.2 For the naming of **facilities within buildings** (i.e., lecture or reading Rooms, etc.) or the naming of renovated facilities, a donation in the range of 50% of the total cost of construction, including furniture and equipment, would be required.
- 11.1.3 Namings associated with a particular building will not preclude further naming within the building.

11.2 Endowed Funds

- 11.2.1 Endowed Gifts are donations made to the Library on the understanding that the principal amount of the donation will be invested for a minimum 10-year period, with the interest earnings to be used to advance specific purposes of the Library, such as the establishment of a lecture, or the funding of a particular program or activity.

- 11.2.2 A minimum Gift of \$25,000 is required to establish and name an endowed fund. Donations of any value may support the Library's Highest Priority Needs (HPN) Endowed Fund.
- 11.2.3 Naming of endowed funds, and any exceptions to the minimum level of the fund, are approved by the CEO and Chief Librarian.
- 11.2.4 Matched Gifts obtained as a result of the Endowed Gift will not be included in the cumulative total for public recognition purposes.

11.3 Programs

For the naming of a program, the support from the donor, in most instances, will represent full funding, whether entirely from the donor or from a combination of majority support from the donor with the balance of funding from other private, public or Library sources. Alternatively, the donation will be sufficient to offset 50% of the annual operating budget of that program.

Two conditions must be met before the Library will permit the naming of a program after a benefactor, or at the request of a benefactor:

- i. after an investigation conducted with due diligence and consideration, the naming must be believed to be consistent with the Purpose and Values of the Library; and,
- ii. the leadership of the program must support the naming.

11.4 London Room Collection

- 11.4.1 For the naming of a collection for the Library's London Room, the support from the donor is made to the Library on the understanding that the donation will be used to advance specific purposes of the Library's London Room, such as the purchase of a special collection of historical value to the City of London and/or the restoration, preservation, digitization, or other technical support of that collection.
- 11.4.2 A minimum Gift of \$10,000 is required to name a collection.
- 11.4.3 Naming of a special collection for the London Room, and any exceptions to the minimum level of the Gift, are approved by the CEO and Chief Librarian.

12.0 DONOR RECOGNITION INSTALLATION (DONOR WALL)

A permanent donor recognition installation listing all those who have contributed \$10,000 or more cumulatively, an Endowed Fund, Planned Gift or Sponsorship to the Library will be maintained in an appropriate, central location. This may take the form of a donor wall, a digital display or another format suitable to the site of installation.

Financial Services will make recommendations concerning this installation and consult with appropriate bodies, including Fund Development, Marketing/Communications and Public Service. Updates will take place annually. Signage standards apply to all physical and non-physical assets.

The Library will honour a donor's request to remain anonymous in tributes, printed materials, permanent signage, and all other forms of public recognition. Library staff donors will not be identified by name in any internally or externally circulated reports without their permission.

Donor Pledge commitments will only be recognized after:

- receipt of a signed Gift agreement or Pledge form; and,
- receipt of at least 20% of the total Pledge commitment or other amount agreed upon by the Library.

13.0 NAMING OPPORTUNITY TERM AND DOCUMENTATION

13.1 General/Fixed Time Period

Existing names and/or commitments shall be honoured as of the approval date of this policy, unless revoked or removed.

All assets named subsequent to the implementation of this policy shall be named for a maximum period of 10 years from the date of recognition signage installation/unveiling except for the name recognition for physical assets such as buildings. The naming of buildings and any additional assets named in perpetuity are an exception and must be approved by the Library Board.

In the case of a naming that is in recognition of non-philanthropic support, the naming will be for the period provided in the agreement. In the case of an Endowed Gift, the naming will continue for the life of the endowment.

If the Library is unable to proceed with the project, the potential benefactor(s) will be invited to redirect their Contribution(s) and/or to curtail future Pledge payments.

13.2 Gift Agreements

All agreements with donors for named recognition shall be recorded in writing, through a signed Pledge form, letter of understanding or Gift agreement. For Gifts equal or greater than \$25,000, a signed Gift agreement is required.

An approved donor recognition sign shall be completed after receipt of 20% of the total Pledge commitment, cash Gift or as agreed upon by the Library. The Library shall honour namings in accordance with the Gift agreement and donor recognition signage form made with the donor.

Name longevity is available for a specific term and is to be stated in the Gift agreement and donor recognition signage form. Once the term has expired, the existing donor shall be provided with the opportunity to make another Gift through a right of first refusal as outlined in this policy.

The Library reserves the right to revoke a naming right in the following circumstances:

- if it is determined that the actions or deeds of the individual or organization that the asset is named for are not in keeping with the Purpose and Values of the Library;
- failure of a named or honoured donor/person to fulfill agreed-upon obligations.

14.0 RECOGNITION OF NAMING OPPORTUNITIES

14.1 General

14.1.1 Content of naming signage is the responsibility of Financial Services with the consent of the donor. Financial Services may consult with the Library CEO and Chief Librarian, as appropriate.

14.1.2 Signage shall be in compliance with the Library's visual identity standards.

14.1.3 Donor logos shall not be used on assets, unless otherwise approved by Financial Services, in consultation with the CEO and Chief Librarian.

14.1.4 Donor taglines or marketing terms shall not be included in donor recognition names, unless otherwise approved by Financial Services, in consultation with the CEO and Chief Librarian. All external signs for building namings shall display the building name along with the Library's visual identity.

14.2 Publicity surrounding the naming of an asset shall be coordinated by the Library and all announcements to publicize a Gift or naming donation shall only be done after:

- receipt of a signed Gift agreement or Pledge form;
- receipt of 20% of the total Pledge commitment, or at the discretion of the Library;
- approval of the proposed naming by the appropriate governing bodies, if applicable; and,
- in agreement with the donor.

14.3 Financial Services is responsible for developing the recognition signage standards for all donation levels. Exceptions to the recognition signage standards are approved by the CEO and Chief Librarian, in consultation with the Library Board as appropriate.

14.4 Initial signage and installation costs are at the Library's expense. If or when there is a change in company ownership and/or the donor recognition name, the signage may be adjusted to the new name. Revised signage and installation costs must meet the approval of the Library. The Library may request that the benefactor bear any associated expenses with the change, such as a change to signage.

15.0 MANAGEMENT OF RECORDS

Financial Services is responsible for maintaining and updating an inventory of all donor named facilities and funds.

16.0 ROLES AND RESPONSIBILITIES

Role	Responsibilities
Fund Development	<ul style="list-style-type: none"> • Maintain and update an inventory of all named facilities and funds • Consider and respond to all requests for naming based on this policy • Facilitate and maintain all Gift agreements • Act as a liaison between the donor and the Library for naming recommendations/requests
Director, Financial Services, or designate	<ul style="list-style-type: none"> • Consider and respond to all requests for naming based on this policy • Consider and approve proposals for new naming opportunities up to \$99,999 • Act as the primary liaison between the donor and the Library for naming recommendations/requests
CEO and Chief Librarian, or designate	<ul style="list-style-type: none"> • Act as Library Board designate, as required • Consider and approve naming proposals that involve naming or renaming of buildings, external facilities, programs and/or any structure that has an exterior name based on this policy • Approve proposals for all new naming opportunities of \$100,000 to \$249,999, and, at the request of Financial Services, provide consultation on new naming opportunities of \$99,999 or less
Library Board	<ul style="list-style-type: none"> • Review and approve non-standard requests (standard is 20%) for minimum amount of a total Pledge commitment that must be received prior to publicly recognizing donor's Gift • Consider and approve honorific naming opportunities (non-financial Contributions) • Ensure that an inventory of all approved benefactor namings is maintained • Review and revoke naming opportunities that may undermine public respect for the Library on the recommendation of the CEO and Chief Librarian • Approve proposals for all new naming opportunities greater than \$250,000

17.0 MONITORING

The Director, Financial Services, or his/her/their designate, will present to the Board an annual monitoring report demonstrating that principles in this policy are in practice, and identifying trends or themes that highlight challenges and emerging issues.

18.0 INQUIRIES

CEO & Chief Librarian
Director, Financial Services

19.0 HISTORY

Approved by Board: September 14, 1988

Reviewed by Board:

- Reviewed: May 17, 1989
- Reviewed: September 28, 2005
- Approved: February 20, 2014 (Replaces: Terms of Reference for Naming Branch Libraries)
- Approved: March 22, 2018

20.0 APPENDIX A: NAMING & DONOR RECOGNITION

Milestone Giving Recognition	
Cumulative Giving Levels (Societies)	
	Mordecai Richler Society \$250,000 or more
	Margaret Laurence Society \$100,000 - \$249,999
	Marshall McLuhan Society \$50,000 - \$99,999
	John McCrae Society \$25,000 - \$49,999
	Susanna Moodie Society \$5,000 - \$24,999
Annual Giving Recognition	
Fiscal Year Giving Levels (Leaders)	
	\$100,000 or more
	\$25,000 - \$99,999
	\$10,000 - \$24,999
	\$5,000 - \$9,999
	\$2,500 - \$4,999
	\$1,000 - \$2,499
Fiscal Year Giving Levels (Community)	
	\$500 - \$999
	\$250 - \$499
	\$100 - \$249
	\$1 - \$99
Donor Hall of Honour	
Donor Wall	
	Cumulative Giving (Societies)
	Endowed Gifts
	Planned Giving (Society)
	Sponsors + Partnerships
NAMING RECOGNITION (Buildings and Building Components)	
\$1,000,000 or more	Exterior building sign; customized wording; wayfinding standards apply
\$250,000 or more	Interior sign; brushed aluminum raised lettering up to 4.5"
\$100,000 - \$249,999	Interior sign; brushed aluminum raised lettering up to 2.5"
\$25,000 - \$99,999	Interior plaque; standard wording on 11" x 17" plaque; letter size varies
\$10,000 - \$24,999	Interior plaque; standard wording on 8" x 10" plaque; letter size varies
NAMING RECOGNITION (Endowed Funds)	
\$25,000 or more	Principle amount of Gift invested to name a fund in perpetuity .
NAMING RECOGNITION (Programs/London Room Collections)	
\$25,000 or more	Minimum principle amount of Gift invested to name a program, Room, Service Area or London Room collection for a maximum period of 10 years
\$5,000 or more	Minimum expendable Gift to name a program for a limited term (for example: \$1,000 per year x 5 years = \$5,000)