



# Altadena Libraries

## ALTADENA LIBRARY DISTRICT | POLICY AND PROCEDURE MANUAL

**SUBJECT:** Naming and Donor Recognition Policy

**SECTION:**

**BOARD APPROVED:** October 26, 2020

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### Purpose and Scope

The purpose of this policy is to establish the process for naming locations and spaces (interior and exterior) of the Altadena Library District (ALD) and consistent guidelines for donor gift recognition by ALD and its affiliated support organizations.

The ALD and its affiliated support organizations, the Altadena Library Foundation (ALF), the Friends of the Altadena Library (FOAL), solicit and accept gifts from individuals, families, businesses, corporations, foundations, and other organizations to support ALD's Vision and Mission and enhance ALD's programs, services, collections, and facilities.

The provisions of this policy are intended to apply to all gifts received by the ALD, and to be replicated in the Donor Recognition policies of ALD's affiliated support organizations.

### Definitions

- **Donors:** Individuals, families, family trusts or foundations, and other types of foundations, trusts and organizations (other than ALF and FOAL).
- **Donor Recognitions:** Designated art piece, board, plaque and the link established by ALD support groups/organizations to recognize donors.
- **Assets:** Physical and intangible objects such as buildings, rooms, interior or exterior spaces, collections, equipment, gardens, walkways, furnishings and art, and substantial equipment/furniture installations, programs offered to the public, licenses, speakers' series, and the like.
- **Endowment:** A permanent fund of property or money bestowed upon an institution or a person, the income from which is used to serve the specific purpose for which the "endowment" was intended.
- **Pledge Agreement:** A promise to pay a specified amount over a set period established by the Library Board of Trustees and/or a recognized support organization.
- **Naming Rights Agreement:** A formal, documented agreement established by the Library Board of Trustees that defines for the donor, the related naming rights, including the term for recognition and the consideration received by ALD in return for naming rights recognition.

## **Naming and Donor Recognition Policy**

It is the policy of the Altadena Library District (ALD) from time to time to recognize the generosity of an individual(s) and/or corporation(s), foundation and/or other donor(s) by choosing to create a specific naming designation for a collection, facility or portion of a facility. Naming opportunities are also available to honor a person's significant service to the Library or to Altadena or society at large.

The Library Board of Trustees (Board) has the sole right to name or rename collections or facilities. The Library's Director may recommend naming opportunities to the Board for consideration. The Board recognizes that naming a collection, facility or portion of a facility is a decision of immense importance; therefore, making these decisions is undertaken with an appreciation for that significance.

While the Board is grateful for and encourages donations from all individuals, businesses and organizations, the Board has the right to decline any gift to ALD and/or reject naming proposals.

## **Donor Recognition**

### **Principles**

The Altadena Library District and its affiliated support organizations will:

- Promptly acknowledge gifts using personalized thank you letters;
- Inform donors about how their gifts are being used; and
- Respect requests by donors not to be publicly recognized or acknowledged (to the extent permitted by law).

### **Recognition**

The Donor Recognition may be placed in any facility of the ALD to recognize major contributions to ALD and its affiliated support organizations. Donors may include individuals, families, family trusts or foundations, and other types of foundations, trusts and organizations (other than ALF and FOAL).

Donors will be listed at the appropriate level on the Donor Recognition when the value of their gifts to the ALD, the ALF, or the FOAL reaches the following levels in any calendar year:

- Level 1 - \$1,000 - \$4,999
- Level 2 - \$5,000 - \$9,999
- Level 3 - \$10,000 - \$24,999
- Level 4 - \$25,000 - \$49,999
- Level 5 - \$50,000 or more

Once recognized on the Donor Recognition for a gift received in full of at least \$1,000 in any calendar year, donors may move up levels based on the cumulative value of their gifts over time. Donor levels may be revised by the Board and will be effective as of the date of the most recent revision.

Contributions established by naming a physical asset will also be listed in the

appropriate category on the Donor Recognition.

ALD and its affiliated support organizations will review donor records on at least an annual basis to determine recognition status.

In the case of memorial or honorary gifts, the name of the individual being remembered or honored will be listed on the Donor Recognition to reflect the cumulative value of gifts received.

Donors whose gifts are matched by organizations will receive recognition for the total of their personal gift and the matching gift. The organization will receive recognition for the total of its matching gifts combined with its direct gifts.

It is at the discretion of the Board to establish supplementary specifications, additional donor recognitions, pledge arrangements, and to recognize donors and sponsors by other methods on a case-by-case basis.

### **Sponsorships**

Public recognition of a sponsor of an event, program, or service may include:

- Acknowledgement of the sponsorship and/or display of the sponsor's logo on the promotional materials for the sponsored event, program, or service;
- A press release submitted to local media outlets;
- A verbal announcement at the beginning of a program;
- An announcement or article in the ALD newsletter; and
- Sponsorships or in-kind donations with a fair market value of \$1,000 or more in any calendar year will also be recognized on ALD's Donor Recognition.

### **Capital Campaigns**

From time to time, the Board may authorize specific fundraising campaigns in support of substantial capital projects and may establish additional donor recognition opportunities specific to that campaign.

**Non-Monetary Donations:** All non-monetary donations must be assessed for value by one of the support groups of the ALD. These donations will be recognized based on the value assessed.

- **"In Kind" Donations:** "In Kind" donations of furniture, equipment, and fixtures will be recognized on the Donor Recognition based on the fair market value of the asset.
- **Specialized Collections:** A specialized collection of library materials accepted or purchased using gift monies may be named for the donor. Donations valued at \$1,000 or more will also be recognized on the appropriate Donor Recognition.
- **Works of Art:** Works of art with an appraised value of \$1,000 or more, which have been accepted for display, will be recognized on the appropriate Donor Recognition.
- **Recognition of gifts of less than \$1000:** All gifts of any amount will be recognized by an ALD support group/organization on an annual basis.

## **Naming Recognition**

The Board in its sole discretion and authority may recognize donors to ALD by naming facilities or a portion of a facility, in accordance with the following guidelines. Appropriate contributions for such naming opportunities will be at the discretion of the Board and will be determined by square footage cost, actual cost of equipment, on-going operating cost, etc., depending on the specific area or item.

Naming recognition may also be bestowed for a non-monetary contribution where the donor has made a sustained, enduring, and exceptional contribution to the advancement of the mission of ALD through leadership, librarianship, or service.

These guidelines also apply to those gifts solicited and received for the benefit of ALD by the ALF and ALDs affiliated support organizations.

## **Assets**

Naming rights are available for new and existing physical assets such as buildings, rooms, interior or exterior spaces, collections, equipment, gardens, walkways, furnishings and art, and substantial equipment/furniture installations. Naming rights are also available for new and existing intangible assets such as programs offered to the public, licenses, speakers' series, and the like.

- a. Meeting rooms, reading lounges, study rooms, special use areas, equipment, green spaces, walkways, other interior and exterior spaces, furnishings and art, and facilities or a portion of a facility may be named or renamed by the Board to recognize a donor. Appropriate contributions for such naming opportunities will be at the discretion of the Board and will be determined by square footage cost, actual cost of equipment, on-going operating cost, etc., depending on the specific area or item.
- b. Endowment proposals such as those for a collection may also include naming rights. Collections may be named or renamed by the Board to recognize a donor. Appropriate contributions for such naming opportunities will be at the discretion of the Board and will be determined by cost of materials, staff, on-going operating costs, etc. depending on the specific program or collection.
- c. A substantial gift is defined as at least twenty-five percent (25%) of the current assessed value of the facility or a number agreed upon by the Board.
- d. For contributions toward new construction or significant renovation of an existing building, a substantial gift is defined as at least twenty-five percent (25%) of the total project cost or a number agreed upon by the Board.
- e. The Board reserves the right to terminate or alter a naming designation under unusual or extraordinary circumstances.
- f. Naming a collection, facility, or portion of a facility to honor individuals who have contributed significantly to the social, academic, scholarly, research or political life of the community rather than a donor is permitted.

Those honored with such a naming might be:

- a. Persons not directly connected with the Library who have contributed significantly to the social, academic, scholarly, research, or political life of the community;
- b. Persons who have contributed significantly, in one way or another, to the growth and development of the Library;
- c. An illustrious former employee, board member or corporator; or
- d. An outstanding statesperson, educator, or scholar who may or may not be connected to the Library or Altadena.

In assigning naming rights values to individual assets, the Board shall take into consideration the expected remaining useful life of the asset, the capital cost and ongoing maintenance cost, frequency of use, and the public prominence and traffic level.

Consideration should also be given the unique character of the ALD as an independent special library district, and - whenever possible - contributions to the local community should be prioritized.

### **Process and Timeline**

The Application for Naming Recognition Form must be submitted to the Library Director. Individuals, families, organizations, or corporations may be suggested for this honor. After the form is submitted, the Library Director will present the proposal as "New Business" to the Board within 90 days of submission. The Board has the final naming authority. The Library Director has final approval for signage associated with named spaces.

The naming rights agreement will define for the donor the related naming rights.

- Pledges
  - The Board may authorize pledge arrangements on a case-by-case basis. Naming recognition, however, where appropriate, will be bestowed only upon fulfillment of the pledge agreement.
- Naming Rights Agreement
  - Naming rights shall only be bestowed subject to execution of a naming rights agreement between ALD and the donor. The naming rights agreement shall define for the donor the related naming rights, including the term for recognition and the consideration received by ALD in return for naming rights recognition.
- Plaques
  - The design of any plaques or other commemorative items must be approved by the ALD District Director.
- Business and Corporations
  - Businesses or corporations are welcomed community partners. Gifts to ALD to

support or enhance ALD's Vision and Mission are gratefully accepted, and naming recognition will be considered as for an individual donor. The mission, product, service, and public image of the donor business or corporation must be consistent with accepted community standards and not contradict or be inconsistent with ALD's Vision or Mission.

#### *Other Cases*

The Board may approve naming recognition for ALD assets and items on a case-by-case basis.

#### **Life of Naming Opportunities**

Naming opportunities do not extend beyond the useful life of the asset. At the end of an asset's useful life, the asset will be retired, and the related naming recognition will end. Major assets (libraries, community room) are anticipated to have longer useful lives; at the end of the useful life of such an asset the Board will seek to provide recognition in another way, if appropriate.

#### **Granting or Termination of Naming Rights**

The Board reserves the right to terminate or alter a naming designation under unusual or extraordinary circumstances. The Board in its sole discretion, may either refuse to grant naming rights, cancel or terminate existing naming rights, and remove plaques or commemorative items, in the event that the character and reputation of the named donor no longer comports with accepted community standards or if the named donor publicly engages in activities contrary to, or inconsistent with, the Vision and Mission of ALD.

Adopted: October 26, 2015

EFFECTIVE DATE: October 26, 2015

Revision of POLICY EFFECTIVE: **October 26, 2020**