

THE CITADEL  
The Military College of South Carolina  
171 Moultrie Street  
Charleston, SC 29409

MEMORANDUM  
NUMBER 1-001

21 September 2019

**GIFT NAMING OPPORTUNITIES AND OTHER RECOGNITIONS POLICY**

**1. PURPOSE**

This policy sets forth college-wide guidelines for gift naming opportunities, the recognition of major gifts at The Citadel, and the procedures for acceptance of gifts to this end. The approval of a naming opportunity includes the naming of the building, facility, structure, or program and the approval to place a plaque, portrait, *etc.* of the individual(s) for whom named.

**2. REFERENCE**

S.C. Code Ann. 59-121-40 (1976)

S.C. Code Ann. 10-1-165 (1976)

**3. DEFINITIONS**

Gift naming opportunity: the provision of a pledge or monetary sum by an individual, group or entity to The Citadel / The Citadel Foundation in exchange for The Citadel's naming of any building/major facility, area within a building/major facility, area on campus, program, professorship, scholarship, or other similar recognition in honor or memory of an individual or a group.

**4. POLICY**

A. The Citadel Foundation is the point of contact for all gift-based naming opportunities, with the exception of named athletic scholarships, which fall under the purview of The Citadel Brigadier Foundation. The named brick program is under the purview of The Citadel Alumni Association.

B. The Citadel Foundation is responsible for developing and maintaining the inventory of naming opportunities at The Citadel to include the prices for each stated naming opportunity. Requests for naming opportunities not approved under this policy must receive approval from The Citadel Board of Visitors and are subject to the contingency provisions outlined in the Named Gift Approval Process below.

C. Recognition Gift Amount. With the few exceptions contained in this policy, the minimum gift requirement for a naming opportunity at The Citadel or its supporting

organizations is \$10,000. Gifts of cash, stock, or materials/services may be made in accordance with existing college gift acceptance policy. Deferred gifts made through a donor's estate will be addressed and reviewed on a case by case basis.

D. Significant Gifts. Significant gifts to The Citadel will provide opportunities for donors to designate the name of a college program, facility, academic unit, scholarship, or other entity of the donor's choosing, providing that the entity is available to be named. The following factors must be taken into consideration when considering these naming opportunities:

1. When a facility or area is named in recognition of a donor or a non-donor honoree, that name will generally be effective for the useful life of the facility or the designated use of the area. If a facility must be replaced or substantially renovated, or the use of an area re-designated, it may be renamed, subject to the specific terms and conditions set forth in any gift agreements related to the prior naming action. In the absence of such terms and conditions, the naming opportunity will terminate along with the associated facility or program.
2. All reasonable efforts will be made to inform in advance the original donors or honorees and their immediate family members as the useful life of the named facility, area, or program comes to an end.
3. Appropriate recognition of earlier donors and honorees shall be included in or adjacent to new and renovated facilities, as well as in redeveloped areas.
4. When proposing to change the function of a named facility or area, a review of related gift agreements must be conducted and documents to determine if the proposed use is consistent with the restrictions that may have been previously stipulated. If the proposal for change in use is inconsistent with the original intended use, legal counsel shall be consulted.
5. To avoid any appearance of commercial influence or conflict of interest, additional due diligence should be taken before recommending the naming of a major program or area, building, open space, roadway, or program that involves any commercial enterprise, corporation, corporate foundation, affiliated organization, or political group.
6. Signage shall be consistent with existing styles as approved by The Citadel Foundation and The Citadel Vice President for Facilities and Engineering.
7. The size, design, and wording of plaques and other signs that acknowledge corporate generosity and express appreciation shall be modest in size and exclude logos to avoid the appearance of advertising or endorsement.
8. The acceptability of these gifts is based on the following: college needs and priorities; the usefulness and instructional or inspirational value to the undergraduate and graduate student body; the physical or aesthetic

enhancement of the campus; the contribution to the heritage and reputation of The Citadel or the accomplishments of its students, alumni, and friends.

9. Gifts in support of naming opportunities may be deductible in accordance with IRS guidelines. For specific tax questions, donors should consult their personal financial or legal advisor. Costs associated with materials and other operational expenses to create donor recognition systems or plaques will be paid for out of the gift from the donor in accordance with industry best practices.
- E. Gift Agreements. Each named gift should be accompanied by a gift agreement that has been approved and signed by the donor or designated donor representative(s) and the appropriate Foundation or college representative(s). Each gift agreement specifies the pledge period to reach the funding level, the purpose of the gift, and any restrictions within college guidelines as to distribution from the fund.
- F. Timeframe for Pledge Gifts. Endowed gifts have five years to reach the minimum funding level established in the gift agreement. Scholarship funds that do not reach the minimum level within the five-year period will be transferred to the Academic Endowment Fund or other agreed-upon fund. Pledges to Class Reunion Campaign named endowed projects may have up to six years to reach the project goal, depending upon when the pledge is made within the scope of the reunion. With regard to other endowments, if the stated minimum is not achieved in accordance with the time period designated in the fund agreement, then the fund may be terminated and the funds expended for the area originally specified by the donor. In the event the pledge by a donor is not fulfilled, the naming opportunity at The Citadel will be forfeited.
- G. Named Gift Approval Process. The Citadel Board of Visitors has final approval for all naming opportunities at the college. However, to streamline the approval process, the Board authorizes The Citadel Foundation to act as coordinator of gift agreements and naming designations in accordance with this policy.
1. The Board of Visitors authorizes the President of The Citadel, as appropriate, and upon recommendation by the Foundation's Development Committee and/or the Naming Opportunities Committee composed of the Provost, Senior Vice President for Operations and Administration, Vice President for Finance and Business, Vice President for Facilities and Engineering, Chief Executive Officer of The Citadel Foundation, and Vice President of Donor Relations of The Citadel Foundation, to make decisions regarding naming opportunities not covered by this policy for gifts under \$100,000. The Naming Opportunities Committee will coordinate naming opportunities with the Vice President or Dean responsible for particular programs or activities being supported by a gift that entitles the donor to a naming opportunity.
  2. For gifts above \$100,000, the President, upon recommendation by the Foundation's Development Committee and/or the Naming Opportunities

Committee, will make recommendations to the Board of Visitors with regard to any decision to name a physical structure or facility at The Citadel.

H. Naming Opportunities.

1. For Naming Opportunities for Academic Gifts, see [Annex A](#).
2. For Naming Opportunities for Building/Facility Gifts, see [Annex B](#).
3. For Naming Opportunities for In-Kind Material and Equipment Gifts, see [Annex C](#).
4. For Naming Opportunities for Memorial and other Special Named Gifts, see [Annex D](#).

- I. Committees Related to Gift Naming and Recognition. For a summary of the committees related to this policy, see [Annex E](#).

**5. COMPLIANCE**

Non-compliance with this policy may result in naming opportunities and other recognition opportunities not being placed in effect.

**6. NOTES**

**A. Dates of Official Enactment and Amendments:**

Approved by the Chair, Board of Visitors 21 September 2019.

**B. Responsible Department:**

Office of Institutional Advancement

**C. Responsible Official:**

Vice President for Institutional Advancement

**D. Cross References:**

N/A

**7. RESCISSION**

The Policy and Procedures for Gift naming Opportunities and Other Recognition adopted by The Citadel Board of Visitors on 12 April 2003 and last amended on 1 May 2015, Memorandum 7, Policy Governing Memorials, Scholarships, and Recognition, dated 30 June 1997.

## 8. REVIEW

Review this policy on a biennial basis.

FOR THE BOARD OF VISITORS:

OFFICIAL

//Signed, FLP, 21 September 2019//  
COL FRED L. PRICE, JR  
Chair, The Citadel Board of Visitors

Attachments:

[Annex A](#), Naming Opportunities for Academic Gifts

[Annex B](#), Naming Opportunities for Building/Facility Gifts

[Annex C](#), Naming Opportunities for In-Kind Material and Equipment Gifts

[Annex D](#), Naming Opportunities for Memorial and other Special Named Gifts

[Annex E](#), Summary of Committees Related to Gift Naming and Recognition

**Annex A**  
**Naming Opportunities for Academic Gifts**

1. Academic Units. Any private gift associated with the naming of the following units shall be of a level that will transform the nature of the unit involved, enabling that unit to achieve excellence that would have been extremely difficult using public funds alone or the available funds at their disposal prior to the transformative gift. The gift shall be in the form of an endowment. Income from the endowment shall be used to provide a margin of excellence for the designated unit and shall not replace state funds previously made available to the unit. The dollar figures below represent the minimum amounts needed for endowments in the various programs.

A. Schools – \$10 million minimum. The Military College of South Carolina is composed of the following five academic schools (three of which have been named with BOV approval):<sup>1</sup>

1. The Tommy and Victoria Baker School of Business,
2. The Zucker Family School of Education,
3. The Citadel School of Engineering,
4. The Citadel School of Humanities and Social Sciences, and
5. The Swain Family School of Science and Mathematics.

B. Department/Institute/Center – \$3-\$5 million (amount contingent on mission and purpose of department/institute/center).<sup>2</sup>

Within each school at the college exist academic departments in specific subject areas. In addition to the schools, institutes or centers of excellence may be created at The Citadel to expand the college's offerings in a specific academic pursuit.

2. Endowed Faculty Positions.<sup>3</sup> A truly outstanding scholar, teacher, or executive, as judged by rigorous nationally accepted standards, will fill the endowed chair designation. An exceptionally gifted and promising scholar will occupy a named professorship. An individual with a successful background in the relevant discipline will be designated a Leader-in-Residence. Earnings from these endowments may fully fund or enhance the holder's state salary and may also be used to provide related program funding, continuing education, release time, and other needs.

A. Dean's Chair – \$2.5 million minimum.

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<sup>1</sup> The remaining schools may require different endowed or non-endowed gift amounts and will be addressed on a case-by-case basis.

<sup>2</sup> Some departments, institutes, or centers may require different endowed or non-endowed gift amounts and will be addressed on a case-by-case basis.

<sup>3</sup> Some endowed faculty positions may require a different amount and will be addressed on a case-by-case basis.

B. Faculty Chair – \$1.5 million minimum.

Chairs underwriting department head positions begin at \$1.5 million.

C. Professorship – \$500,000 minimum.

D. Executive-in-Residence – \$250,000 minimum.

3. Speaker Series.<sup>4</sup> A speaker series brings to The Citadel a variety of individuals with broad experience and expertise and whose presentations have an interdisciplinary appeal. Earnings from the endowed fund may provide for honoraria, travel expenses, and other associated costs.

Speaker Series – \$250,000 minimum.

4. Scholarships. Scholarships are usually designated for undergraduate students and may be awarded based on academic merit and/or financial need. While specific criteria for eligibility for scholarships may be established, flexibility contained in the gift agreement will allow the college to be more successful in recruiting students to The Citadel. Donors will be encouraged to place scholarship gifts in one of the following seven scholarship programs, with associated minimum gift requirements.

A. Citadel Scholars – \$500,000 minimum. Awarded to top academic performers to provide a full scholarship for four years.

B. Citadel Leadership Scholars – \$100,000 minimum. Awarded for academic performance combined with proven leadership potential.

C. Citadel Armed Forces Scholars – \$75,000 minimum. Awarded to students who have earned a three-year or four-year ROTC scholarship.

D. Citadel Brigadier Scholars – \$500,000 minimum. Awarded to student athletes, with criteria in accordance with NCAA guidelines.

E. Named/Restricted Academic Scholarships – \$50,000 minimum. Restricted to the intentions of the donor in accordance with The Citadel Foundation Scholarship Guidelines.

F. Citadel Brigadier Foundation Named/Restricted Athletic Scholarships. \$25,000 - Invested within The Citadel Brigadier Foundation Memorial Fund and restricted to the intentions of the donor in accordance with NCAA guidelines.

G. Named Term Scholarships (non-endowed) – \$10,000 minimum. Provide at least \$2,500 a year for four (4) years with the option to renew.

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<sup>4</sup> Some speaker series may require a different amount and will be addressed on a case-by-case basis.

5. Endowed Program Fund. Endowed program funds will be referred to by the name established by the donor in support of an academic discipline or program, classroom or other area enhancement, research, faculty development, or faculty and staff awards. All named endowed program funds must have approval of the Provost prior to acceptance of the gift.

Endowed Program Fund – minimum \$25,000 (specific amount contingent on mission and purpose of program).

**Annex B**  
**Naming Opportunities for Building/Facility Gifts**

1. Buildings & Structures. Under normal conditions, funds which have been given to name a building, area, or structure shall be: (a) restricted to the construction or refurbishment of the building or structure, and (b) be placed in a restricted endowment fund dedicated to the principal use of the building or area. Permanent naming of a building, structure, or area is contingent on the completion of the required gift. The naming of buildings, structures, or areas will be reviewed on a case-by-case basis. Construction will not begin on buildings dependent upon private funding until the cost of construction has been paid and endowed funds have been pledged over a payment period not to exceed five years. The following categories deal primarily with new buildings, structures, or areas. The naming of existing buildings will be addressed on a case-by-case basis in accordance with the State of South Carolina Heritage Act.
  - A. *Private Funding of Buildings and Structures.* If a new building is to be funded 100% from private funds, the gift to name the building must be *at least 60% of the total projected construction costs of the facility.* The gift should fund 50% of the construction budget as well as an endowment fund [*10% of total construction costs*] to provide for programs and maintenance of the facility.
  - B. *Private/Public Funding of Buildings and Structures.* If the new building is dependent upon a private funding component, the gift to name the building must be *at least 50% of the total dollars raised from private sources* to fund a portion of the construction budget as well as an endowment fund [*10% of total construction costs*] to provide for programs and maintenance of the facility.
  - C. *Public Funding of Buildings and Structures.* If the new building is constructed entirely from public funds, a private gift may still be used to establish a naming opportunity. The private gift to name the building should be *at least 50% of the total construction costs of the facility.* Typically, the gift will establish an endowment fund restricted for use of the programs and maintenance of the facility.
2. Academic Teaching Space.<sup>5</sup> Under normal conditions, funds that have been given to name a lab, auditorium, lecture hall, or classroom area shall be: (a) restricted to the construction or refurbishment of the area and (b) be placed in a restricted endowment fund dedicated to the principal use of the lab/classroom. Lab, auditorium, lecture hall, or classroom naming opportunities may be reviewed on a case-by-case basis. Typically the minimum amounts necessary to name an area of this type are as follows.
  - A. Named Laboratory and Fund – \$250,000 - \$500,000.
  - B. Named Laboratory and Fund (Renovation or New Construction) – \$500,000.
  - C. Named Auditorium and Fund – \$250,000 - \$500,000.
  - D. Named Auditorium and Fund (Renovation or New Construction) – \$500,000.

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<sup>5</sup> Some academic teaching spaces may require a different amount and will be addressed on a case-by-case basis.

E. Named Lecture Hall and Fund – \$100,000 - \$250,000.

F. Named Lecture Hall and Fund (Renovation or New Construction) – \$250,000.

G. Named Classroom and Fund – \$50,000.

H. Named Classroom and Fund (Renovation or New Construction) – \$75,000.

3. Non-teaching Rooms. Funds that have been given to name an office, work room, conference room, balcony, portal, veranda, deck, or other similar space shall be: (a) restricted to the construction or refurbishment of the area and (b) support the particular department where the space is located. These non-teaching room naming opportunities may be reviewed on a case-by-case basis. Typically the minimum amount necessary to name an area of this type is as follows

Named Non-teaching Room – \$10,000 minimum gift requirement.

4. Rooms in Barracks. Funds that have been given to name a room in a barracks will be restricted to the deferred maintenance endowment at The Citadel Foundation. This fund provides for the long-term maintenance and repair of all campus facilities and property. Room plaques will be consistent with other recognition in buildings on campus.

Named Room in Barracks – \$10,000 minimum gift requirement.

**Annex C**  
**Naming Opportunities for In-Kind Material and Equipment Gifts**

1. The Citadel Museum. The Director of the Daniel Library will administer, care for, and conserve the display of gifts and artifacts contributed to the museum. Not all proposed gifts are guaranteed acceptance or display space. The Artifact Acceptance Committee, under the leadership of the Director of the Museum, must approve all artifact gifts prior to the transfer of ownership. For a named display, the total value of donated items must meet the \$25,000 minimum naming opportunity gift requirements established in this policy. The Artifact Acceptance Committee may recommend a naming opportunity be established for the donor. Recommendations for recognition shall be made to the Naming Opportunities Committee.
2. Daniel Library. The Director of the Daniel Library will administer the acceptance of books, journals, maps, portraits, murals, or other materials of significant intellectual, historical, or cultural value donated to the library and the display of certain materials on a rotating basis, as space is available. Not all proposed gifts are guaranteed acceptance or display space. The Collections Acceptance Committee, under the leadership of the Director of the Library, must approve all proposed library gifts prior to the transfer of ownership. In keeping with the minimum gift requirements established in this policy, the Collections Acceptance Committee may recommend a naming opportunity be established for the donor. Recommendations for recognition shall be made to the Naming Opportunities Committee. Regarding the Daniel Library portraits, consistent with guidelines set forth by The Citadel Board of Visitors and the existing portraits of the Board of Visitors Chairmen in the Daniel Library, the dimensions of the portrait without the frame shall not exceed 2'1" x 2'6." The exterior dimensions of the frame are not to exceed 2'6 ½" x 2'11 ½", and the style of the frame shall be consistent with the other frames.
3. Equipment. Gifts of equipment or material goods by individuals, corporations, and other organizations can have a tremendously positive impact on academic life at The Citadel. However, not all proposed gifts of equipment or material goods fall within the scope of use for the college in its mission. Therefore, not all proposed gifts are guaranteed acceptance. The Equipment Acceptance Committee, under the leadership of the Associate Vice President for Academic Affairs, must approve all proposed gifts of information technology or academically related equipment and furnishings prior to the transfer of ownership. An Equipment Sub-committee, under the leadership of the Vice President for Facilities and Engineering, must approve all proposed gifts of non-academic items such as cars, boats, furniture, trees, other equipment or material goods prior to the transfer of ownership. In keeping with the gift values established in this policy, the Equipment Acceptance Committee may recommend a naming opportunity be established for the donor. Recommendations for recognition shall be made to the Naming Opportunities Committee.
4. Construction-Related Gifts. Gifts of material or services by individuals, corporations, and other organizations can have a tremendously positive impact on academic life at The Citadel. However, not all proposed in-kind gifts related to construction of facilities fall within the scope of use for the college in its mission. Therefore, not all proposed in-kind material, equipment, or services gifts are guaranteed acceptance. The

Construction Gifts Committee, under the leadership of the Vice President for Facilities and Engineering, must approve all proposed gifts related to new construction or renovation of existing facilities at The Citadel. Construction-related gifts are covered by policies established by the State of South Carolina and will follow all guidelines established in the State Manual for Planning and Execution of Permanent Improvements. Such gifts require an extensive documentation and review by the State of South Carolina. In keeping with the gift values established in this policy, the Construction-Related Gifts Committee may recommend a naming opportunity be established for the donor. Recommendations for recognition shall be made to the Naming Opportunities Committee.

The Vice President of Donor Relations of The Citadel Foundation shall be involved at the schematic drawing phase for renovations and/or new construction in order to:

- A. Incorporate a plan for donor recognition signage and materials into the drawings and final plan.
- B. Retain an expert in donor recognition to assist in budgeting and planning for placement, size, and design of recognition materials (for example, Daniel Library renovation, Capers Hall rebuild, *etc.*).
- C. Plan for the creation of collateral materials to market those opportunities.

**Annex D**  
**Naming Opportunities for Memorial and other Special Named Gifts**

1. Holliday Alumni Center. Donors may be memorialized in the courtyard of the Holliday Alumni Center by means of a Citadel Alumni Association brick placed in the Alumni Courtyard.

Named Brick – \$275.

2. Special Naming and Memorial Opportunities. From time to time, an individual, group (*i.e.*, a Class Reunion Campaign committee), or organization may wish to create a naming opportunity, including but not limited to all portraits and statues of individuals to be displayed in any Citadel building or on campus not outlined in this policy. In these instances, the individual, group, or organization is required to complete a New Naming Opportunity Request Form and submit it to the Naming Opportunities Committee for approval. The Naming Opportunities Committee is composed of the Provost, Senior Vice President for Operations and Administration, Vice President for Finance and Business, Vice President for Facilities and Engineering, Chief Executive Officer of The Citadel Foundation, and Vice President of Donor Relations of The Citadel Foundation. The Naming Opportunities Committee may make recommendations to the President to name facilities, structures, or areas in honor or memory of individuals who have distinguished themselves in their service to the college. With this in mind and upon recommendation by the President, The Citadel Board of Visitors may approve the naming of a structure, facility, or area on campus.
3. Summerall Field. The exception to the aforementioned potential named areas on campus is Summerall Field; there is a moratorium on any future naming opportunities such as trees, benches, monuments, plaques, *etc.* on this specific area of campus. In rare instances, the exceptions to the moratorium are subject to approval.

**Annex E**  
**Summary of Committees Related to Gift Naming and Recognition**

1. Naming Opportunities. Coordinates all Gift Naming/Recognition.

Membership: Provost, Senior Vice President for Operations and Administration, Vice President for Finance and Business, Vice President for Facilities and Engineering, Chief Executive Officer of The Citadel Foundation, Vice President of Donor Relations of The Citadel Foundation.

2. Artifacts Acceptance. Coordinates Acceptance of Museum Gifts.

Membership: Director of the Daniel Library and other designated members.

3. Collections Acceptance. Coordinates Acceptance of Library Gifts.

Membership: Director of Daniel Library and other designated members.

4. Equipment Acceptance. Coordinates Acceptance of Academic and Technology Gifts.

Membership: Associate Vice President for Academic Affairs and other designated members.

5. Equipment Sub-Committee. Coordinates Non-Academic/Technology Gifts.

Membership: Vice President for Facilities and Engineering and other designated members.

6. Construction-Related Gifts. Coordinates Acceptance of Construction-Related Gifts.

Membership: Vice President for Facilities and Engineering and other director designated members.