



Naming and Recognition policy

Basic Stewardship Principles

1. A number of basic principles underlie ARU stewardship policy:
 - Where gifts are designated for a specific purpose, donors must be able to rely on a commitment that funds have been applied to that purpose. Donors should also expect ARU to be able to show where the gift is residing if it has not been spent or the output of the gift where it has been spent (for example, by providing a cost breakdown for a building or identifying a scholarship holder).
 - All donors should receive immediate written acknowledgement and thanks for their gift (where the gift is received directly by the Development Office a letter of acknowledgement should be sent ideally within 24 hours of receipt).
 - All donors (other than those who have requested anonymity) should be acknowledged publicly, for the duration of their gift, either in the Donor Roll or in the annual Donor Report.
 - Academics who are in receipt of donation income are likely to need to play a role in stewarding the gift – personal involvement and the development of a network of personal relationships will be important in creating a sustainable development culture at the University.
 - All donors should be invited to at least one University event per year. These will include the annual Friends and Supporters Dinner, and a more informal Friends and Supporters Reception.
 - All donors should be informed, on a regular basis, about how general fundraising income is being used (and in the case of major gift donors about the progress of the specific project to which they have given). As Development activity gains momentum, a Newsletter / e-newsletter may become an appropriate way to achieve this.

Regular Gifts

2. The following standards of recognition should apply for people who make any kind of gift through regular giving / the annual fund:
 - Letter of thanks from Development Manager; letter from the VC for gifts above £1,000.
 - Annual Report / Newsletter.

3. Additionally:
 - The Annual Report / Newsletter should continue to incorporate a list of donors.
4. As Development activity gains momentum, regular donors should also be recognised on any donor board that ARU may introduce in public spaces such as the Library for lower level supporters.

Major Gifts

Gifts to fund bursaries - usually for Widening Participation (WP), scholarships, and enriching the student experience (Priority 1 - People)

5. In addition to the basic recognition provided to all donors, bursary funders should be entitled to the following opportunities:
 - The opportunity to name the bursary (see below).
 - The opportunity to designate the bursary for a particular academic subject/ geographical region/post-graduate or undergraduate, if desired.
 - Information (non-decision making involvement) regarding the selection of the recipient.
 - An agreed reporting arrangement through which the donor is informed about the recipient's progress.
 - The opportunity to meet the recipient (possibly including a small lunch or reception).
 - Publicity for the gift – as appropriate.

6. Naming opportunities

See Appendix -> Table 1)

Gifts for research - academic posts / initiatives (Priority 2 - Research)

7. Other than in exceptional circumstances it is recommended that the minimum duration for external funding of a post should be three years. Ideally, annual payments on fixed-term gifts should be adjusted to account for inflation, using a standard index agreed in advance with the donor.
8. Gifts to fund posts for a fixed-term (the most common form of corporate funding) have implications for the long-term continuation of the post in the event that funding is not renewed after the initial term. In such cases, ARU will need to take a decision prior to appointment as to whether it will continue to fund the post after expiry of the gift (post offered on an open-ended basis), or whether the appointment itself is for the duration of the gift only (post offered on a fixed-term basis).

Recognition for academic post / initiative donors

9. In addition to the basic principles noted above, donors supporting academic posts or other ventures should be entitled (if they so desire) to:
- The opportunity to name the post (see below) for the duration of the gift.
 - Information about the selection process for the post-holder.
 - An agreed reporting arrangement through which the academic concerned updates and informs the donor about work in progress.
 - Publicity for the gift – as appropriate.

Naming opportunities:

See Appendix -> Table 2)

Gifts for Buildings/other Major Capital Projects (Priority 3 - Facilities-related giving)

10. The following are recommended general principles for the gift level required in order to name a building or facility in entirety:
- **Option 1:** Donor contributes a minimum of 25% of the total project cost
 - **Option 2:** Donor makes the single gift that makes the project possible (possibly not as much as 25% of the cost but an essential major contribution)

Recommended levels of gift and recognition for capital projects:

See Appendix -> Table 3)

Appendix: Tables

Table 1) Priority 1: People Naming opportunities: Item and recognition	Approx value range	Approx min gift for naming	Duration of naming
Name a UK/EU DPhil or Masters scholarship in perpetuity	£500K - £1M	£750K	Perpetuity
Name an overseas DPhil or Masters scholarship	£60K - £150K	£90K	3 years
Name a UK/EU DPhil scholarship (3 years) or a Masters scholarship (ie. create and name three separate £20,000 scholarships, one per year)	£50K - £75K	£60K	3 years
Name a 5-year WP bursary for a medical student	£15K - £100K	£15K	5 years
Generic Widening Participation (WP) bursary awards. Transforming lives by enabling the	£500-£2K per year	£1K per year	5 or 10 years

most able students to study at ARU who would otherwise not be able to, due to financial challenges and / or being from less traditionally advantaged backgrounds. Bursary named after donor in all references digital and print.			
Enabling students to have as rich and broad an experience at ARU as possible. Grants to course leaders to enhance the student experience; implemented through the Course Leaders Extra Curricular Fund (CLECF). These would fund course-related items and activities.	£500-£3K	N/A	N/A

Table 2) Priority 2: Research Naming opportunities			
Item and recognition	Approx value range	Approx min gift for naming	Duration of naming
Faculty-specific or Research Institute-specific professorial post / chair	£500K - £1M	£150K	Duration of the post / chair only
Contributions towards specific RI projects (such as GSI's former Resource Scarcity Mapping project). This would include major contributions to fund in full or majority the costs of a specific research project.	£50K - £1M	£100K	Duration of project

Table 3) Priority 3: Facilities Recommended levels of gift and recognition for capital projects:			
Item and recognition	Approx value range	Approx min gift for naming	Duration of naming
Building (such as School of Medicine). Donor named on plaque, donor board in building atrium, in all references digital and print, and online donor roll.	£1M - £50M	25% of total cost or £12M	Perpetuity
Auditorium / lecture theatre / skills lab / simulation suite – suggested minimum donation 25% of total cost. Donor named on physical door nameplates, donor board in	£50K - £300K	25% of total cost or £75K	Perpetuity

building atrium, in all references digital and print, and in online donor roll			
Discreet pieces of equipment such as anatomy tanks for SoM. Donor named on donor board, in all references digital and print, and online donor roll.	£10K - £50K	25% of total cost or £10K	Perpetuity