

UNIVERSITY OF EDUCATION, WINNEBA

NAMING POLICY

DATED: JULY 25, 2011

ACKNOWLEDGEMENT

We will like to acknowledge our indebtedness to the fact that in designing this policy the Committee consulted and made liberal use of the ideas contain in the following documents: Queens University Naming Policy; Chronicle of Higher Education Vol. LVII 42, No. 27, March 11, 2011 and the Internal Revenue Act 592 (2000), Ghana.

1. BACKGROUND

The naming of university activities or property is a well-established custom among Higher Education Institutions. The University of Education, Winneba (UEW) welcomes the opportunity to honour those who have rendered outstanding service to the University. It also welcomes the opportunity to honour individuals whose generous philanthropic benefactions make possible the construction or restoration of buildings, the establishment of endowed chairs, the development of programmes, funding of Scholarships, Research etc.

2. RATIONALE

Several factors make it desirable for UEW to establish a policy that guides the granting of named recognition at the UEW. These include the need to:

- provide a protocol for establishing permanent recognition to those who render outstanding benefaction and/or exemplary service to the University;
- promote consistency in the tributes paid by the University to its supporters;
- ensure appropriate utilization of the very limited number of naming opportunities;
- provide guidelines for those involved in discussions with donors

3. SCOPE

This policy guides the granting of named recognition at the University of Education (UEW) for:

- buildings or substantial parts of buildings (wings, rooms, laboratories) or other locations on campus such as streets/lanes pathways, gardens etc
- special research, teaching, recreational service or other facilities
- programs of research, teaching
- departments, faculties, schools, institutes and colleges
- lectureships, special lecture series, awards for excellence in teaching, research, or performance of other academic, administrative and technical responsibilities
- fellowships, scholarships, bursaries, prizes and other awards
- endowed chairs, professorships
- library collections of books: electronic and other materials
- series of publications produced by a division or department; innovative and creative works, endowed publication grants for books not designated as part of a series; awards for outstanding publications
- collections of works of art
- trophies and other awards for curricular achievement including sports and performances
- such other entities as the University may from time to time see fit to name in order to recognize service or philanthropic donations

4. GENERAL NAMING POLICY

- 4.1 Ultimate authority to accept or decline any proposal to name at the University rests with the University Council
- 4.2 Ultimate authority to discontinue the designated name of a building, room, or area, or to transfer the name to another building, room, or area at UEW rests with the University Council.
- 4.3 Consistent with UEW **Gift Acceptance Policy** (*See attachment*), the acceptance of any philanthropic donation which involves a proposal to name is conditional upon approval of the naming by the University Council.
- 4.4 Notwithstanding any other provision of this policy, no naming will be approved or continued that will call into question the public image of the University.
- 4.5 No name will be approved that will imply the University's endorsement of a partisan political or ideological position. This does not preclude a naming with the name of an individual who has at one time held public office .
- 4.6 When permanent named recognition has been extended for a gift received, it will be honoured in perpetuity. In the event of changed circumstances, e.g. a facility no longer exists, the University reserves the right to determine the form which such permanence may take.
- 4.7 From time to time, it may be appropriate to offer named recognition for a limited period of time under certain conditions. This includes the fact that the support base which earned the recognition may have changed. In this case, UEW is obligated to honour the name for that period of time, subject to renewal of the opportunity.
- 4.8 The University may choose to extend recognition through naming (e.g. a named building) after a donor/donors provided that the donor will provide all or at least forty (40%) of the cost of funding the facility or activity.
- 4.9 Provisions in this policy that refer to naming for a benefactor also in general apply to naming for a third party at the wish of a benefactor.
- 4.10 Only in exceptional circumstances will facilities or activities be named to honour outstanding service of members of Faculty or Staff while the honoree remains in the full time employment of the University. Members of Faculty and Staff making philanthropic donations remain eligible for naming recognition.
- 4.11 The Registrar's Department of the University shall be responsible for maintaining and updating an inventory of named facilities.
- 4.12 The Director for Institutional Advancement shall advise on consistent application of current, approved naming policies with respect to recognition of philanthropic donations
- 4.13 The Registrar's Department shall advise on consistent application of current, approved naming policies with respect to recognition of outstanding service of members of staff
- 4.14 The University reserves the right to decide on the physical displays which may accompany named recognition.

5. GUIDELINES TO NAMING PROCEDURES

5.1 Approval Process

- 5.1.1 Individuals contemplating a naming opportunity to recognize outstanding service are to consult with the Registrar for information .
- 5.1.2 Individuals contemplating a naming opportunity to recognize philanthropic donations are to consult with the Director for Institutional Advancement for information and expertise.
- 5.1.3 The Registrar and the Director for Institutional Advancement are to confer for all proposed namings.
- 5.1.4 If a building, room, or area is to be named, the Vice-Chancellor shall ensure that occupants of the building or users of the area and the University Community are aware.
- 5.1.5 If the Vice- Chancellor is satisfied that the proposal falls within the policy guidelines, or is sufficiently unique to justify special consideration, the Vice-Chancellor shall write to members of the Endowment Trust Fund Board (ETFB), outlining the reasons for the proposal and requesting that the Board (ETFB) respond within four weeks.
- 5.1.6 The Vice- Chancellor and the Chair of the ETFB shall consider any objections that are received and decide whether a formal motion should go forward to the full Board.
- 5.1.7 The same procedure as outlined above (5.1.1-5.1.6) shall be followed when there is a recommendation to discontinue the designated name of a building, room, or area, or to transfer the name to another building, room, or area.
- 5.1.8 Where wider consultation is deemed appropriate by the Registrar, the Director for Institutional Advancement, and/or the Vice-Chancellor, an Adhoc Committee, may be set up by the Vice-Chancellor to advise him/her regarding a proposed name.

The Committee shall include representation from:

- The Registrar's Department
- Office of the Director for Institutional Advancement
- Office of the Director of Works and Physical Development
- Vice-Chancellor's Nominee and
- One other member as appropriate

- 5.1.9 The Vice-Chancellor may endorse or reject the Committee's recommendation in forwarding his proposals through the ETFB to the Academic Board from where it will go to the University Council for a final decision.

5.2 Negotiating Name Recognition for Philanthropic Donations:

It is the responsibility of officials negotiating on behalf of the University to consult with the Office of the Director for Institutional Advancement when gifts involve a proposal to name:

- 5.1 It is the responsibility of officials negotiating on behalf of the University to advise potential benefactors that the acceptance of any philanthropic donation which involves a proposal to name is conditional upon final approval of the naming by the University Council.
- 5.2 Namings are subject to satisfactory funding arrangements for the full cost of the project. When the philanthropic donation does not meet the full cost of the project, proposed names are subject to completion of satisfactory funding arrangements, and the naming will become official only after that is achieved.
- 5.3 The Director of the Office for Institutional Advancement is responsible for securing approval from the Vice-Chancellor / Vice-Chancellor's adhoc Committee for schedules of naming opportunities and the level of philanthropic donation required for each.

GIFT ACCEPTANCE POLICY

1. BACKGROUND

The importance of voluntary charitable contributions to the University of Education, Winneba (UEW) is increasingly apparent. UEW welcomes gifts which enable it to fulfill its mission of teaching, research, and community service.

Through the promotion of voluntarism and philanthropy, the Office for Institutional Advancement provides fund-raising support to assist the University. The significance of tax laws in Ghana makes it an important obligation of the University to record and acknowledge all gifts received. The Office for Institutional Advancement is responsible for acknowledging receipts for all charitable gifts received by UEW in compliance with the requirements of the **Internal Revenue Tax Act 592 (2000)**, and in accordance with procedures established by the University.

2. RATIONALE

This document has been established to:

- 2.1 ensure that informed decisions are made on the acceptance of gifts and that such gifts are receipted in accordance with the requirements of the **Internal Revenue Tax Act 592 (2000)**
- 2.2 ensure that efficient administrative, legal, and accounting practices and procedures are followed
- 2.3 enable accurate reporting of gifts bestowed upon UEW and its affiliated institutions
- 2.4 ensure consistent, equitable relations with donors

In order to ensure that this Policy continues to be effective, it shall be reviewed periodically. The Office for Institutional Advancement is responsible for initiating this review (at least every 5 years).

3. SCOPE

This policy is established to govern the acceptance of all gifts made to UEW and any of its affiliated institutions, whether such gifts are lifetime gifts or gifts from estates.

4. THE POLICY

- 4.1 UEW holds itself to a high standard of ethical conduct, both within its own community of scholars, students, alumni and employees, and in all of its external relationships and interactions – with businesses and commercial enterprises, with other external organizations, and with friends and donors.

- 4.2 In particular, the University will not accept gifts, enter into business relationships, or accept external support that will compromise its public image or commitment to its essential values as articulated in the University's Mission Statement.
- 4.3 UEW values and will protect its integrity, autonomy and academic freedom, and does not accept gifts when a condition of such acceptance would compromise these fundamental principles.
- 4.4 Ownership of all gifts directed to UEW vests in the University, whether such gifts are for the benefit of the University generally or for some specific purpose in it.
- 4.5 UEW may elect to accept or decline any gift. The final decision to accept or decline a gift rests with the **University's Governing Council**.
- 4.6 Acceptance of any gift contribution which involves a proposal to name is conditional upon final approval of the naming by the **University's Governing Council**.

4.7 **Gift Eligibility**

4.7.1 The following gifts are deemed eligible for acceptance by UEW:

- Outright gifts of cash, cheques, or securities
- Gifts-in-kind
- Life insurance
- Annuity contracts
- Gifts of residual interest
- Trust Agreements
- Bequests

4.8 **Gift Limitations:**

4.8.1 When conditions placed on a gift offer are judged to be administratively difficult or not in the University's best interest, the Director for Institutional Advancement, in consultation with the appropriate University officials, may request that the terms of the gift be revised, or recommend that the gift be declined.

4.8.2 The following gift conditions cannot be accepted by the University for scholarships, fellowships, awards, bursaries, or other financial aid funds:

4.8.2.1 Conditions which, by explicit designation, require the exclusion of, or discriminate against - a group or class, unless such exclusion or discrimination has the effect of favouring one or more designated groups as provided for in any approved institutional plan or equity scheme.

4.8.2.2 Stipulations designating a specific recipient by a donor

4.9 Gift Acceptance

- 4.9.1 When negotiating a gift on behalf of the institution, individuals/officials shall consult with the Office for Institutional Advancement to ensure due diligence prior to making a decision with respect to a gift which might expose the University to an uncertain and potentially significant liability, is precedent-setting or involves sensitive issues, may have come from illegal activities, involves a proposal to name because of its unusual nature, presents questions as to whether it is within the role and scope of the University.
- 4.9.2 The University's solicitation of gifts is informed by and consistent with priorities established by appropriate University processes.
- 4.9.3 Occasionally, funds sought and contributed for a University purpose are insufficient to make the project viable. If the University is unable to proceed, benefactors will be invited to redirect their contributions to an analogous purpose, and/or to curtail future pledged payments.
- 4.9.4 Undesignated gifts shall be used for such purposes as the University judges will best advance its mission and priorities. Designated gifts shall be used expressly for the purposes for which they are given, which must be consistent with the University's mission and priorities.
- 4.9.5 Charitable gifts to UEW in the form of cash or cheques received by any department in the University, shall be sent via courier, or else presented in person, along with related correspondence and any specific instructions, to the Office for Institutional Advancement.
- 4.9.6 On a regular basis, the Office for Institutional Advancement shall prepare a summary report of gift activities for the Endowment Trust Fund Board.
- 4.9.7 The Office for Institutional Advancement shall advise the Office of the Registrar and the Vice-Chancellor of bequests received. Upon receipt of the bequest the Office for Institutional Advancement shall issue an acknowledgement

GLOSSARY OF KEY TERMS

Gift: A voluntary transfer of cash and kind, from individuals, industry, foundations and other sources to the University for either unrestricted or restricted utilization in the operation of the University. Gifts are normally made without expectation of return; no consideration, no benefit of any kind - to the donor or to anyone designated by the donor, may result from the payment.

Gifts may be monetary (cash, cheques) or non-monetary e.g. securities, real estate, or personal property).

Private Grants: Revenues received by the university from individuals, industry, foundations, governments, and other sources, for the support of University programs/projects. Such grants are like gifts – they are donative in nature and they are bestowed voluntarily without expectation of any tangible benefit in return. .

Official Charitable Receipt: The official charitable receipt is a statement issued by the University to donors that includes the business number issued to the University by the Ghana Revenue Authority, a declaration as to the value of the gift, date of the gift and name of the donor. Receipts are normally accepted by the Ghana Revenue Authority to support the calculation of the allowable "non-refundable tax credits".

Gift-in-Kind: Donated tangible and intangible assets and property such as real estate, notes, mortgages, limited partnership interests, royalty or copyright interests, art, books, equipment, automobiles, inventory, personal property, securities, and other physical assets or materials, which represent value to the University.

Expendable gifts: Gifts or grants given to the University, which the donor has directed are to be immediately used in support of various programs or projects.

Retained gifts: Gifts or bequests, given to the University, to be held permanently for the income derived, as part of the University's endowment fund.

Designated gifts: Gifts, given to the University, where the donor has specified where in the University the support is to be directed. Gifts may be “designated”, for instance, to a particular Faculty or School.

Undesignated gifts: Gifts, given to the University, where the donor has not specified where in the University the support is to be directed.

Unrestricted gifts: Gifts, given to the University, where the donor has not specified the purpose for which the gift is to be used.

Restricted gifts: Gifts, given to the University, where the donor has specified that the gift is to be used to support a particular purpose.

Note: For instance, a gift may be “designated” by a donor to the Faculty and restricted as to purpose for buying library books, or a gift may be “designated” to another Faculty, but unrestricted as to use in that setting.

Gift Pledges: Gift contributions to the University, which are "pledged" over a period of time (normally over three (3) years, depending on the size of the gift and the nature of the appeal).

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This Policy was drafted by the following:

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