

## NORTH SHORE CONGREGATION ISRAEL

### “Imagine the Possible” Capital Campaign

#### Naming and Recognition Policies

##### Overview

North Shore Congregation Israel wishes to recognize the generosity of donors who make gifts to the “Imagine the Possible” campaign. The following guidelines describe the methods set in place to recognize the generosity of such donors by offering naming opportunities for gifts at various levels.

To ensure consistency and the fair and equitable distribution of donor recognition, the following policies have been approved by NSCI’s Board following the recommendations of the “Imagine the Possible” Campaign Executive Committee. The donor recognition policies will be used by NSCI’s staff and volunteers to:

1. Best represent the interests of the donor
2. Guide recognition discussions with prospective donors
3. Ensure a uniform approach that is consistent with NSCI’s values.

##### Naming Policies

The following policies shall govern NSCI’s naming of facilities, spaces and endowments:

1. Approval A list of naming opportunities will be provided to NSCI’s Board of Trustees for approval, after receiving advice and counsel from the Campaign Executive Committee (CEC). Any changes or exceptions to the approved list of naming opportunities must likewise be approved by the Board of Trustees after receiving advice and counsel from the CEC.
2. Gift Agreement The donor and NSCI will enter into a gift agreement, which will state the purpose, conditions and timing of the gift. The donor will be provided an original executed copy of the agreement, and a second original executed copy will be given to NSCI’s Executive Director for safekeeping and to monitor the gift’s administration process.
3. Type of Gift Naming opportunities will be awarded in recognition of a financial contribution of a current nature, such as an outright gift or pledge to be completed within a defined period of time, generally no longer than five years.
4. Family Gifts A combined total of gifts from individual family members may be recognized as a greater family gift.

5. Named Facilities The following are general guidelines for determining the gift level to name a space: To name a **new facility or space**, the gift level must be at least 50 percent of the actual cost of said facility or space. The cost to name **existing facilities** will be based on the approved list of naming opportunities.
6. Named Programs Currently there are no opportunities to provide funding for specific programming through the “Imagine the Possible” campaign. Generally, a current or proposed program can be named for a donor who provides the full cost of operating the program; the donor’s name will remain attached to the program for the time period in which that donor’s contribution supports the program.
7. Named Endowments Although not currently a priority of the “Imagine the Possible” campaign, a named endowment fund for a restricted purpose and for which there is a separate accounting may be established *for a minimum of \$1 million*. Annual reports on such endowment funds will be made to the donors. Gift agreements for a named endowment should include language that reserves NSCI’s right to re-designate the endowment should the purpose of the endowment no longer be deemed necessary. In all cases, the original intent of the donors should guide any re-designation.
8. Duration of Named Facilities, Spaces, or Programs The period of time a donor’s name will be attached to a building will be determined at the time the gift is made. In general, this period will be for 20 years or as long as the use of the building or space remains substantially the same as specified at the time of the naming, whichever is shorter.

In the event of demolition or substantial renovation of a major facility, existing names will not automatically be transferred to a new or renovated facility. If a named space is to be substantially renovated; expanded; or demolished; or if named program is to be concluded, NSCI will discuss with the donor or his/her representative possible options to transition the naming to another facility or program.

In such cases, NSCI reserves the right to exercise these options:

- Transfer the existing name to the new or renovated facility or new program or create a plaque to indicate that the new facility occupies the site of a facility previously known by another name.
- Ask the previous donor and/or family member(s) or designee(s) to make a new naming gift while providing recognition for the previously named gift
- Offer the naming opportunity to a new donor if the original donor and/or family member(s) or designee(s) decline(s), to make a new naming gift as above

Note that exceptions to this policy will be considered only if there is an executed agreement document specifying otherwise.

9. Removal of Name  
If the donor does not fulfill the terms of the gift agreement upon which the naming was approved, NSCI reserves the right to remove the previously approved name and allow the space or program to be re-named.

In the unlikely event that the continuation of the named space or program may compromise the public trust or reputation of NSCI, NSCI reserves the right to remove a previously approved name. These determinations must be made and approved by the Board of Trustees. In the event of such re-naming or removal of a name, NSCI shall have no financial responsibility, despite anything that may be stated or implied to the contrary.

#### Other Donor Recognition

Donor recognition outside of naming opportunities will be offered to those who donate gifts that are under the naming threshold. They may include benches, trees, bricks and a recognition display on the interior of the building.

1. A campaign donor recognition display will be placed in a centralized location. Individuals, families, foundations, and other benefactors of any level will be recognized. Recognition may be according to the level of their respective support.
2. NSCI will recognize campaign donors in its annual report, in newsletters and on the NSCI and in other places as deemed appropriate by campaign leadership. Those who wish to remain anonymous will be given that option.