



THE CITY OF SAN DIEGO

MEMORANDUM

DATE: December 1, 2020

TO: The Balboa Park Committee
Agenda of December 3, 2020

FROM: Christina Chadwick, Assistant Deputy Director, Parks and Recreation
Department

SUBJECT: Botanical Building Naming Opportunities and Donor Acknowledgement
Workshop

SUMMARY

This report is for workshop information only. No action is required on behalf of the Committee at this time. The Committee will be asked to take action in early 2021.

BACKGROUND

The Balboa Park Master Plan, adopted by City Council on July 25, 1989, guides overall development of Balboa Park. That document also recommends preparation of Precise Plans for areas of Balboa Park that require a greater level of detail. To that end, the Central Mesa Precise plan was prepared, and subsequently adopted by City Council on October 20, 1992.

The Central Mesa Precise Plan is divided into sections that address the various geographic regions of the Central Mesa. These areas include the West Prado, East Prado, North Prado, War Memorial & Zoo Parking Lot, Pepper Grove, and Palisades. The Botanical Building and Gardens are located in the East Prado area of Balboa Park (see Attachment A).

The Balboa Park Sign Manual was recently updated by the Balboa Park Conservancy and adopted by the Balboa Park Committee on September 5, 2019. However, the Sign Manual does not address donor acknowledgement. Receipt of Donations is addressed in City Council Policy 100-02 (see Attachment B), and Naming of City Assets is addressed in City Council Policy 900-20 (see Attachment C).

The Balboa Park Conservancy was formed in 2011 as a public benefit 501 (c)(3) non-profit organization to create a public/private partnership for the betterment of Balboa Park. One of the goals of the Conservancy is to raise funds to address the needs of Balboa Park. In 2016 the Conservancy undertook the project of restoration of the Botanical Building and adjacent Gardens. In partnership with the City, the Conservancy has identified the necessary scope of work for the project and has provided the City with partial construction plans (bridging documents) to be used in the solicitation of a design/build contract. The City has short-listed three design/build teams and is currently soliciting a Request for Proposals for the completion of construction documents and construction of Phase I improvements.

In 2019 the City received a State of California grant for the Botanical Building restoration project. Based on the available funding the Conservancy and the City have identified a scope of work for Phase I of the project. Phase I will focus on the restoration of the structural components of the building as well as the wood lath. The scope will also include the reconstruction of the arches and windows originally found on the south facade, reconstruction of the original east and west grand doorway facades, reconstruction of missing ornamentation at the south entrance and reconstruction of interior walkways and planters per the original configuration. Additive alternates will include reconstruction of the arches and windows originally found on the north facade, renovation of the north maintenance area, two multi-purpose rooms on the north side, and fountains on the interior of the building. Additive alternates will be awarded based on bid results and available funding.

The Balboa Park Conservancy (Conservancy) is raising funds for implementation of Phase II of the project. Phase II improvements will include completion of items unable to be accomplished as a part of Phase I. Phase II will also include reconstruction of the original pergola located in the west garden by the Museum of Art (Fine Arts Palace), renovation of the east and west gardens, new walkways, re-planting of the horticultural exhibits inside the Botanical Building, re-landscaping the exterior gardens, and new irrigation systems.

WORKSHOP DISCUSSION

The Conservancy has embarked on a capital campaign to raise funding for the implementation of Phase II of the Botanical Building and Gardens Restoration Project. As with any capital campaign, donor acknowledgement is a component. The Conservancy has partnered with RSM Design to prepare a donor acknowledgement and naming program to aid in their fundraising efforts. This Donor Acknowledgement program was created in collaboration with City of San Diego Historic Resources staff in 2017 as well as the Botanical Building stakeholder steering committee 2016, and Parks & Recreation Staff. The goal of this program is to create consistent and unified opportunities for donor participation in this project without compromising the historical and visual integrity of this historic asset.

DONOR ACKNOWLEDGEMENT

Donor acknowledgement is the inclusion of a donor's name in some form within the boundaries of a project. Donor acknowledgement can appear as a name on a small plaque, inclusion in a larger plaque, engraved into donor pavers and many other forms. This program was designed in accordance with Council Policy 100-02. The following describe the proposed donor acknowledgement opportunities.

Pavers

Pavers can be made of several different materials including natural stone, concrete or clay. Pavers are typically rectangular or square but can come in other shapes. Pavers are typically set on a sand base with sand swept joints to lock the pavers into place. The proposed donor acknowledgement pavers would be engraved with donor names and are proposed at following locations.

Central Rotunda: The Central Rotunda of the Botanical Building will receive new concrete pavement as a part of Phase I improvements. The paved area is a circle with a diameter of approximately 38 feet. Donor acknowledgement pavers would be located around the perimeter of the concrete pavement. Pavers would be rectangular and made from natural stone with lettering engraved approximately one inch in height. There would be approximately 174 donor acknowledgement pavers, or 100% of the pavers, at this location.

Historical Pergola (Reconstruction): Phase II improvements will include the reconstruction of the Pergola that was once located in the west garden on axis with the two existing fountains and adjacent to the Museum of Art. Reconstruction of the Pergola will include new steps, an accessible walkway and paving. Concrete unit pavers will be located on the upper and intermediate tiers of the reconstructed Pergola. Pavers will be a blend of four sizes to create a more natural and random appearance of paver stones. Donor names would be located on approximately 30 to 40 percent of the pavers with lettering approximately one inch in height. There would be approximately 400 to 540 donor acknowledgement pavers at this location.

Engraving

Similar to the engraving in pavers, engraving into the newly constructed material is also proposed. Engraving into existing historic materials will not be allowed. Engraving is proposed in the following locations:

Benches: New benches will be included as a part of Phase II improvements. Donor acknowledgement would be engraved into the vertical face of each bench in letters approximately 1 inch to 1-1/2 inches high. There would be up to 27

benches with donor acknowledgement located in the West Garden, East Garden and around the Lily Pond. There would be an additional six benches located inside the Botanical Building.

Interior Water Features: Phase II improvements include the addition of two new water features inside the Botanical Building. These two water features would replace the existing non-historic water features. One water feature will be a traditional antique tiered fountain and the other will be a simpler design with water spilling from a single small basin into a larger pool of water. Donor acknowledgement is proposed for each of these two water features. Donor acknowledgement would be in the form of engraved lettering with a height of two to three inches. Lettering would be located on the front face of the water basin of each fountain.

Plaques

Plaques are proposed for donor acknowledgement in several locations. Plaques will be made of either bronze or cast plaster based on the location. The bronze plaques will be of typical construction for the material (cast bronze with hidden mounting). Cast plaster plaques will be surface applied and will have the lettering engraved into the surface. The following are locations proposed for plaques:

Pergola Statues: The entrance to the original 1915 pergola was flanked by two statues on pedestals. These two statues will be replicated along with the pergola. Donor acknowledgement would be in the form of a cast plaster plaque with engraved lettering approximately one to two inches in height. The plaques would be approximately 15 inches wide by 10 inches high. There would be donor acknowledgement on each of the two pedestals.

Reconstructed Urns and Pedestals: Historically there were four pedestals with planted urns atop them flanking the two walkways along the Lily Pond along El Prado. Two additional pilasters with urns were located along the east/west walkway adjacent to the Casa del Prado building. Phase II of the project proposes to reconstruct these missing pedestals and urns. Donor acknowledgement is proposed for each of the six pedestals. Donor acknowledgement would be in the form of a cast plaster plaque with engraved lettering approximately one to two inches in height. The plaques would be approximately 20 inches wide by 12 inches high.

Drinking Fountain: Phase II proposes the replacement of the one existing drinking fountain in the Gardens near the Lily Pond bridge. Donor acknowledgement would be in the form of a small bronze plaque set within the paving adjacent to the drinking fountain. Lettering would be approximately 1/4 inch to 3/4 inch high and the plaque would be approximately seven inches wide by five inches high.

Interior Planters: Phase I of the project includes reconstruction of the walkways and planters within the interior of the Botanical Building. Donor acknowledgement would be in the form of a small bronze plaque set within the cap, or top, of the planter walls. Lettering would be approximately one inch to 1-1/2 inches high and the plaque would be approximately 24 inches wide by 6 inches high. The plaque would be flush with the wall cap. These plaques would be at twelve locations within the Botanical Building.

NAMING OPPORTUNITIES

Naming opportunities are reserved for larger donations. Acknowledgement will be similar to those identified in Donor Acknowledgement above and per the following. Naming Opportunities are in accordance with Council Policy 900-20, Naming of City Assets. Each opportunity listed below would have only one naming opportunity. Based on feedback from the previous workshop with the Balboa Park Committee on November 5, 2020 the naming opportunity for the Lily Pond has been removed from consideration.

Naming Opportunities include:

1. Welcome Gallery
2. Central Rotunda
3. North Annex
4. North Entrance Lobby
5. Multi-purpose Room (West)
6. Multi-purpose Room (East)
7. West Wing Gardens
8. East Wing Gardens
9. West Patio
10. Pergola (Reconstruction)
11. West Fountain Plaza
12. East Fountain Plaza
13. West Gardens
14. East Gardens
15. Potting Shed Area

Welcome Gallery: The Welcome Gallery lies between the two entrances to the Botanical Building on the south side. The Gallery would be staffed by volunteers to provide information to visitors. Naming recognition would be in the form of brass or bronze letters set flush in the pavement band between the two central columns. Lettering would be approximately three to five inches in height.

Central Rotunda: The Central Rotunda is the space located beneath the main dome of the Botanical Building. This space will host rotating seasonal displays or can be temporarily cleared for special events. Naming recognition would be in the form of brass or bronze letters set flush in the pavement. Lettering would be approximately four to five inches in height.

North Annex: The North Annex encompasses the North Entrance Lobby and the two Multi-purpose Rooms (see below). Naming recognition would be in the form of a bronze plaque placed on the wall. The plaque would be approximately 16 inches wide by 9 inches high with lettering approximately $\frac{3}{4}$ inch to one inch high.

North Entrance Lobby: The North Entrance Lobby will provide access from the Botanical Lot and drop-off area found on the north side of the Botanical Building. Naming recognition would be in the form of a bronze plaque placed on the wall. The plaque would be approximately 16 inches wide by 9 inches high with lettering approximately $\frac{3}{4}$ inch to one inch high.

Multi-purpose Rooms (West and East): Two multi-purpose rooms will be added to the north side of the Botanical Building, one on each side of the North Entrance Lobby. These rooms will be used for staff workspace, small materials storage, research and classes. Naming recognition would be in the form of a bronze plaque placed on the wall. The plaque would be approximately 16 inches wide by 9 inches high with lettering approximately $\frac{3}{4}$ inch to one inch high. There would be one plaque for each of the two multi-purpose rooms.

West Wing Gardens and East Wing Gardens: The spaces west and east of the Central Rotunda are referred to as the West Wing Gardens and the East Wing Gardens respectively. These spaces will be reconstructed in the same configuration as the original 1915 planters and walkways. Naming recognition would be in the form of brass or bronze letters set flush in the pavement at the base of the main central planter in each wing. Lettering would be approximately three to five inches in height. Naming would occur in two locations, one for each wing.

West Patio: The West Patio is a new element for the Botanical Building. The Patio will replace the stairs and landing in this location. The West Patio will provide visitors an opportunity to look out into the park and re-planted West Garden. Naming recognition would be in the form of brass or bronze letters set flush in the pavement at the threshold of the doors on the west end of the Botanical Building. Lettering would be approximately three to five inches in height.

Historical Pergola (Reconstruction): As previously noted, Phase II improvements will include the reconstruction of the pergola that was once located in the west garden on axis with the two existing fountains and adjacent to the Museum of Art. Naming recognition would be in the form of a cast plaster plaque with engraved lettering approximately one to two inches in height. The plaque would be approximately 28 inches wide and 10 inches high. The plaque would be located on the column of the pergola.

West Fountain Plaza and East Fountain Plaza: Phase II improvements will include replacement of the concrete pavement at the two historical water features located immediately south of the Botanical Building. These spaces are identified as the West Fountain Plaza and the East Fountain Plaza. There are two options for naming recognition in these spaces. One option is for placement of brass or bronze lettering set flush with the new paving. Lettering would be approximately three to four inches high. The second option would be in the form of a cast plaster plaque to be located on one of the existing planter urn pedestals located closest to the Plaza. The plaque would be approximately twenty inches wide by 12 inches high with lettering approximately one to two inches in height.

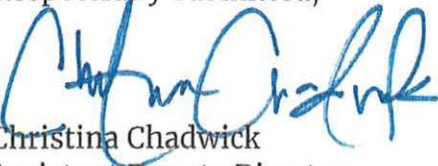
West Gardens and East Gardens: The West Gardens and East Gardens are the planter beds located west and east of the Lily Pond respectively. These planter beds will be re-landscaped as a part of Phase II improvements. Naming recognition would be in the form of a bronze plaque set in a decorative natural boulder and placed in the planter beds. The plaque would be approximately 16 inches wide by 9 inches high with lettering approximately $\frac{3}{4}$ inch to one inch high. An alternate option is a natural boulder with the lettering engraved directly onto the boulder. Lettering would be approximately one inch high.

Potting Shed: Phase I improvements include a new potting shed and workspace area to be located north of the Botanical Building's west wing. The space will be used by maintenance staff in preparation of botanical exhibits and will house the pumping equipment for the interior misting system. Naming recognition would be in the form of a bronze plaque placed on the wall. The plaque would be approximately 16 inches wide by 9 inches high with lettering approximately $\frac{3}{4}$ inch to one inch high.

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Overall the donor acknowledgement and naming opportunities proposal has been designed to be as unobtrusive as possible and meet aesthetic and historical preservation concerns. As previously noted, this proposal has been reviewed by Historical Resources staff and the Historical Resources Board's Design Assistance Subcommittee and found to be consistent with the Secretary of the Interior's Standards for historic preservation.

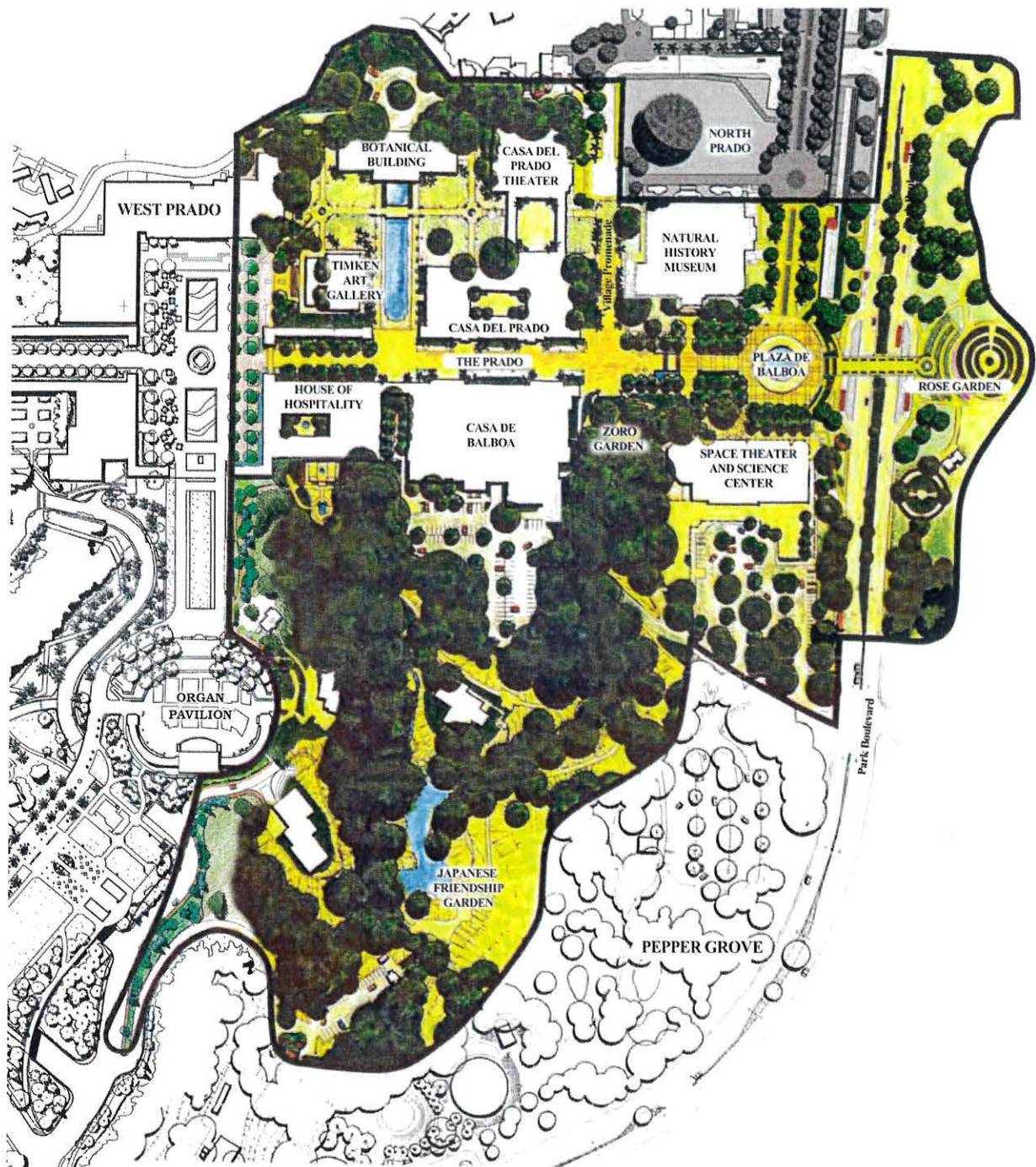
Respectfully submitted,



Christina Chadwick
Assistant Deputy Director

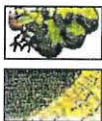
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Attachments: A. East Prado Graphic
 B. Council Policy 100-02
 C. Council Policy 900-20
 D. Presentation
 E. Letters of Support

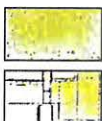


East Prado

revised 5 April 2012 Figure 30



Trees



Lawn



Groundcovers



Paved Pedestrian Areas



CITY OF SAN DIEGO, CALIFORNIA
COUNCIL POLICY

Attachment B

CURRENT

SUBJECT: DONATION ACCEPTANCE

POLICY NO.: 100-02

EFFECTIVE DATE: June 25, 2014

BACKGROUND:

Donations of every type are offered to the City of San Diego (City) for general or specific purposes. Uniform criteria and procedures guide the review and acceptance of such donations, confirm that the City has relevant and adequate resources to administer such donations, and ensure that the City appropriately acknowledges the generosity of the donor.

PURPOSE:

To provide guidelines for accepting gifts and donations in a responsible, transparent, and accountable manner that is consistent with the City's strategic goals.

SPECIFIC OBJECTIVES:

1. To establish and guide relationships with donors who share the City's commitment to provide a high quality civic environment;
2. To enrich our community by responsibly and efficiently managing donations;
3. To generate revenue to fund new and existing facilities, projects, programs and activities for the benefit of the City and its residents; and
4. To work with non-profits whose missions support the City's strategic goals.

DEFINITIONS:

Defined terms used in this Council Policy appear in italics. For purposes of this Council Policy:

Beneficiary Department Head shall mean the Director of the City department, agency, board, or commission, or his/her designee, for which a *donation* is designated or intended. The Chief Operating Officer or designee shall act as the *Beneficiary Department Head* if no department, agency, board, or commission is designated or intended.

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Donation or Gift shall mean a monetary (cash) contribution, endowments, personal property, real property, financial securities, equipment, in-kind goods or services, or any other asset that the City has accepted and for which the *donor* has not received any goods or services in return. For purposes of this Council Policy, the terms “*donation*” and “*gift*” shall be synonymous.

Donor shall mean a person or other legal entity that proposes or provides a *donation* to the City.

Endowment shall mean donations that are restricted to the extent that only earnings, and not principal, may be used for a particular City department, location or purpose.

Restricted Donation shall mean donations designated at donor request for a particular City department, location, or purpose.

Unrestricted Donation shall mean a donation to the City without any limitations being placed upon its use.

GENERAL PRINCIPLES:

1. This Council Policy is intended to guide the manner in which City staff accepts *donations* on behalf of the City.
2. *Donations* do not become the property of the City until accepted by the City consistent with this Council Policy.
3. Only City officials authorized by this Council Policy may accept *donations*.
4. The City has no obligation to accept any *donation* proposed by a *donor*.
5. All *donations* will be evaluated by the City prior to acceptance to determine whether the *donation* is in the City's best interest and is consistent with applicable City laws, policies, ordinances, and resolutions.
6. The City does not provide legal, accounting, tax or other such advice to *donors*. Each *donor* is ultimately responsible for ensuring the *donor's* proposed *donation* meets and furthers the *donor's* charitable, financial, and estate planning goals. As such, each *donor* is encouraged to meet with a professional advisor before making any *donation* to the City.
7. The City must determine whether an expenditure of City funds, either a direct outlay of City funds or the use of City forces and materials, is associated with or required by acceptance of the *donation* prior to acceptance.

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8. The *donation* must be used for official City business, and not for political activities or other personal business.
9. A *donor* may restrict a *donation* for a particular City department, location or purpose, but not designate the City official who may use the *donation*.
10. If required, the City will report a *donation* made to the City to the Fair Political Practices Commission (FPPC) in accordance with the timelines and directives described in title 2, section 18944 of the California Code of Regulations.
11. If a *donation* to the City is made at an elected City official's behest from a single source in a calendar year, and the *donation* meets or exceeds the amount established by the FPPC, the elected City official must file a FPPC Form 803 with the City Clerk disclosing this information.
12. The *Beneficiary Department Head* is responsible for acknowledging receipt of and thanking, on behalf of the City, the *donors* of *donations*.
13. The City shall comply with all applicable laws and regulations of the Internal Revenue Service regarding the acceptance of *donations*.
14. *Donations* of artworks and artifacts are exempt from this Council Policy. Artworks are defined and governed by San Diego Municipal Code 26.0701 et seq. Artifacts are items with a fair market value of less than \$5,000 offered to the City for unrestricted use and accepted by the Mayor or Council President on behalf of the City from representatives of foreign or domestic governments, business leaders, Sister Cities and their affiliates, private citizens, organizations, or other parties intending to express appreciation or foster diplomatic exchange and goodwill and/or to symbolize a significant event or relationship with the City. The City Clerk administers *gifts* of artifacts.
15. The Beneficiary Department Head shall work with the City Comptroller or his/her designee to determine the appropriate accounting for the donation.

POLICY**Types of Donations**

Donations may be received in the form of cash, financial securities, real or personal property. Donations may be *Restricted* or *Unrestricted*.

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The procedure for accepting *donations* shall be as follows:

- **Donations of Trust and Perpetuity Funds:** *Donations* of trust and perpetuity funds shall be administered by the City of San Diego Funds Commission when placed under its custody pursuant to San Diego Charter section 41(a).
- **Donations of Publicly Traded Equity and Debt Securities:** Once the Office of the City Treasurer has been notified, *donations* of publicly-traded equity and debt securities will be immediately sold upon receipt in the City's designated brokerage account. The sales proceeds are then transferred from the City's brokerage account to its depository bank account. Cash donations are available for budgeting and appropriation consistent with the City's budgeting process.
- **Donations of Real Property:** *Donations* of real property may be accepted upon completion of the following process:
 1. The Real Estate Assets Department shall determine the approximate value of the *donation* and shall seek City Council approval to accept a *donation* if the Real Estate Assets Department determines that the *donation* is in the City's best interest and acceptance is consistent with applicable City laws, policies, ordinances, and resolutions.
 2. When seeking such approval, the Real Estate Assets Department shall report to the City Council regarding:
 - the appraised value of the *donation*;
 - any expenditures or maintenance obligations for the City associated with the *donation*;
 - potential liabilities associated with the *donation*, such as hazardous conditions or environmental concerns;
 - whether the *donation* has any special restrictions, and if so, if those restrictions are acceptable to the City; and
 - any recommendations for conditions of acceptance.
 3. The Real Estate Assets Department shall administer the *donation* of real property.

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- **Donations of Cash and Real Goods:** *Donations of cash and real goods* may be accepted upon completion of the following process:

1. The *Beneficiary Department Head* shall evaluate whether the donation:
 - is in the City's best interest and is consistent with applicable City laws, policies, ordinances, and resolutions;
 - has any special restrictions and if so, if those restrictions are acceptable to the City;
 - obligates the City to make an immediate or initial City expenditure which has not been included in the approved City budget; and
 - creates a new, one-time or an on-going general maintenance obligation for the City.
2. The *Beneficiary Department Head* shall seek a resolution from the City Council to accept, appropriate and expend the *donation* from the City Council if the *donation* requires expenditures in excess of the *Beneficiary Department Head's* approved annual department budget.
3. The *Beneficiary Department Head* shall give notice of the City Council's decision to the *donor* within 10 business days following the City Council's determination to accept or reject the proposed donation.

- **Donations of Cash/Real Goods Valued at \$99,999 or Less:** *Donations* with an aggregate value of \$99,999 or less may be accepted by the *Beneficiary Department Head*.

- **Donations of Cash/Real Goods Valued at \$100,000 to \$249,999:** *Donations* with an aggregate value of \$100,000 to \$249,999 may be accepted by the Mayor.

1. The *Beneficiary Department Head* shall seek approval from the Chief Operating Officer or designee if the *donation* does not require expenditures that exceed the *Beneficiary Department Head's* approved annual budget. The Mayor may formally accept the donation upon receipt of such approval.

- **Donations of Cash/Real Goods Valued at \$250,000 or Greater:** *Donations* with an aggregate value of \$250,000 or greater should be accepted by the City Council.

1. The *Beneficiary Department Head* shall seek approval from the Chief Operating Officer or designee if accepting the *donation* does not require expenditures that exceed the *Beneficiary Department Head's* approved annual budget.

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2. Upon receipt of such approval, *the Beneficiary Department* shall seek a resolution from the City Council authorizing the City to accept the *donation*.
- **Council Notification:** *Beneficiary Department Heads* will send a quarterly update, via email, of all rejected cash and non-monetary *donation* offers valued at \$5,000 or more, with a short description of the reason for rejection, to the Chief Operating Officer or his or her designee, who will notify the City Council.

HISTORY:

Adopted by Resolution R-178999	02/18/1964
Amended by Resolution R-216051	05/26/1976
Amended by Resolution R-223033	03/12/1979
Amended by Resolution R-283002	11/15/1993
Amended by Resolution R-284389	08/01/1994
Amended by Resolution R-309042	06/25/2014

RELATED AUTHORITIES:

Code of Ethics and Ethics Training, Council Policy No. 000-04
City of San Diego Ethics Ordinance, San Diego Municipal Code §§ 27.3501 to 27.3595
City Charter §41(a) Funds Commission
San Diego Municipal Code §§ 26.0701 et seq.
Cal. Code Regs. title 2, § 18944

CITY OF SAN DIEGO, CALIFORNIA
COUNCIL POLICY**CURRENT**

SUBJECT: NAMING OF CITY ASSETS

POLICY NO.: 900-20

EFFECTIVE DATE: April 13, 2017

BACKGROUND:

The City, through its departments, and advisory boards and commissions, has followed a number of processes/policies for *naming* or *renaming* its parks, libraries and other *City Assets*. Generally, these policies provide for the *naming* or *renaming* requests based on (1) the location of the *City Asset*, (2) the identity of an individual of historical significance to the local area, or (3) the identity of an individual or entity whose contributions to the City and/or the community supports the request. From time to time, the City has also named *City Assets* after a person or entity who has provided significant financial support for the *City Asset* being named.

The City wishes to replace any existing *naming* or *renaming* policies with one comprehensive citywide policy, as follows:

PURPOSE:

The purpose of this policy is to establish uniform guidelines for *naming* and *renaming* of *City Assets*.

This policy outlines the criteria, conditions, and procedures that govern *naming* and *renaming* of *City Assets* in order to maintain their integrity, to encourage philanthropic giving while acknowledging public investments, and to safeguard against unwanted commercialization of *City Assets*.

This policy does not apply to:

1. Marketing Partnerships entered into under Council Policy 000-40, except that consideration should be given to Guiding Principles, Section C (Funding Criteria) below in regards to them;
2. The *naming* of public streets addressed in Chapter 12, Article 5, Division 11 of the San Diego Municipal Code (SDMC);

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3. Artworks, which are exempt from this Council Policy. Artworks are defined and governed by San Diego Municipal Code 26.0701 et seq.;
4. Public safety-related *City Assets*;
5. Council Policy 100-02 (Donation Acceptance);
6. *Donor Acknowledgement*; and
7. Council Policy 200-10 (Honorary Street Names).

DEFINITIONS

For the purpose of this policy, the following definitions apply:

Board: Board as recognized by the San Diego Municipal Code (SDMC) and/or City Charter.

City Assets: Tangible or intangible items of value that are owned or created by the City, including but not limited to both *City facilities* and leaseholds that do not exceed 35 years and/or that confer ownership rights by agreement. This definition does not include Artworks, which are city assets under San Diego Municipal Code 26.0701 et seq.

City Facility (included in City Assets): Any part of real property or structure owned by the City or for which *naming* rights are conferred by agreement, including, but not limited to parks, libraries, *Recreational Facilities* buildings, parking facilities, interior or ancillary features that are a part of, or within, a larger facility and other City facilities.

City Sponsored or Recognized Support Group: May include, but is not limited to: recreation councils, "friends of" organizations, Community Planning Groups, town councils, or similar entities.

Commission: Commission as recognized by the SDMC and/or City Charter;

Department Director: Appointed director of the department that owns the *City Asset* eligible for *naming* or *renaming*. The director may assign this responsibility to other department staff within their delegation of authority.

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Donation or gift: A monetary (cash) contribution, endowments, personal property, real property, financial securities, equipment, in-kind goods or services, or any other *City Asset* that the City has accepted and for which the *donor* has not received any goods or services in return. For purposes of this Council Policy, the terms “donation” and “gift” shall be synonymous.

Donor: A person or other legal entity that proposes or provides a *donation* to the City.

Donor Acknowledgement: Excluding *naming*, donor acknowledgement is permanent writing on plaques, walls, stone carvings, pavers, bricks, electronic display, or interpretive signs that are temporary or permanent and are used to recognize the financial contribution of a *donor*.

Funding: Financial or in-kind resource to provide funding that might result in *naming* or *renaming*.

Funding Source: The source of *funding* which can include individuals, nonprofit organizations, and for-profit entities.

Naming: The selection and approval by the City for the initial *naming* of a *City Asset* other than streets within the public right of way.

Non-profit Organization: A corporation or an association that conducts business for the benefit of the general public without shareholders and without a profit motive.

Recreational Facility (included in City Assets): Major structures such as community centers, aquatic facilities, picnic shelters/pavilions, athletic courts, and fields.

Renaming: The selection and approval by the City for a new name of an existing *City Asset* other than streets within the public right of way.

Sign Ordinance: The City’s sign regulations contained in SDMC §§ 142.1201 – 142.1292.

POLICY:

The policy of the City is to reserve *naming* or *renaming* of *City Assets* for circumstances that will best serve the City’s interests and ensure a worthy and enduring legacy for the City. To this end, the City supports *naming* or *renaming* requests within the following broad categories:

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1. Location. As a general policy, a name should assist the public in identifying its location. The City shall first consider the name of the community area, the names of nearby geographic features, and the names of adjacent schools and streets when it is considering a *naming/renaming* request.
2. Significant Events, People, and Places. The history of a major event, place, or person may play an important role to preserve and honor a community's history, landmarks, or prominent geographical features. The City may name a *City Asset* for a major event, place, or person of social, cultural or historical significance to the local area when the *City Asset* is associated with or located near the events, people, or places of social, cultural or historical significance. The relationship of the event, person, or place to the *City Asset* must be demonstrated through research and documentation.
3. Outstanding Individuals. This category is designed to acknowledge individuals who have made substantial contributions to benefit the City, local community, park and recreation system, or public library. Naming or renaming a *City Asset* for an outstanding individual is encouraged for those person's whose significance and good reputation have been accepted in the community, City and/or State/National history. If it is not appropriate to name the larger *City Asset* after an individual, then naming or renaming can be subordinate to the name of the larger *City Asset* or the City may name an area or portion of the *City Asset* after an individual, including but not limited to a meeting room, structure, fountain, or garden.

In considering the *naming* or *renaming* of a *City Asset* after an individual, priority will be given to those who made a sustained and lasting contribution to:

- a. The City of San Diego
- b. The State of California
- c. The United States of America

4. Major Donations. The City has benefited from the generosity of residents, organizations, and businesses. The significance of *funding* may warrant acknowledging the *funding source* through *naming* or *renaming*.
 - a. The threshold for *naming* or *renaming* a *City Asset* for an individual, organization, or business when *funding* is involved should include a *donation* agreement and one or more of the following:

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- i. A significant contribution towards the capital construction costs of the structure;
 - ii. A deed to the City of land for the majority of the *City Asset* by the *donor*; and/or
 - iii. A twenty-year endowment for the continued maintenance and operations of the *City Asset*.
- b. *Donors* seeking *naming* or *renaming* rights for major *donations* with respect to an individual should use the guidelines for Outstanding Individuals above.

GUIDING PRINCIPLES**A. General Provisions**

- 1. In considering proposals for the *naming* or *renaming* of a *City Asset*, the City will consider whether the proposed name will:
 - a. Engender a strong positive image consistent with the City's goals and values;
 - b. Be appropriate relative to the *City Asset*'s location and/or history;
 - c. Incorporate the assigned historic name if the *City Asset* is a designated historical resource listed on the local, State, or National Register of historic resources;
 - d. Have historical, cultural, or social significance for future generations;
 - e. Commemorate places, people, or events that are of continued importance to the City, community, region, or state;
 - f. Have symbolic value that transcends its ordinary meaning or use and enhances the character and identity of the *City Asset*;
 - g. Have broad public support; and
 - h. Not result in the excessive commercialization of the *City Asset*.

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2. The City will not permit corporate logos, insignias, or advertising slogans in a permanent naming or renaming of a City facility.
 3. A park or library's official documented name should not include the name of a corporation or business. If an organization or foundation's name consists of one or more individuals' names, then the guidelines for Outstanding Individual *naming* should be utilized.
 4. When considering the *naming* or *renaming* of a *City Asset* (excluding official documented names of parks and libraries) that includes a business name, *naming* or *renaming* must be for a defined contractual period of time with regard to the life of the *City Asset*.
 5. All related signage shall comply with the *Sign Ordinance*.
 6. The City shall retain full editorial control over all related signage subject to the *Sign Ordinance* and adhere to the below criteria.
 - a. Any physical form of on-site recognition shall not interfere with visitor use or routine operations.
 - b. The form of any on-site recognition shall:
 - i. Be of appropriate size and color within the design scheme of the facility;
 - ii. Not dominate the sign in terms of scale or color;
 - iii. Not detract from surroundings or any interpretive messages; and
 - iv. Be subject to review and approval by the *Department Director*.
- B. *Funding Acceptance Criteria.* The City may not accept *funding* as part of a *naming* or *renaming* proposal that would create any conflict of interest, as set forth in the City's Ethics Ordinance (Chapter 2, Article 7, Division 35 of the SDMC) and the Fair Political Practices Commission regulations (Title 2 of the California Code of Regulations, sections 18110 – 18997). The following principles form the basis of the City's consideration of *naming* or *renaming* proposals based on *funding* of a *City Asset*:

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1. The mission of a *Funding Source* must not compete, impair or conflict with the policies, goals or operations of the City;
2. The *funding source* must provide a desirable association according to the Guiding Principles under this Policy; and
3. *Naming or renaming* rights offered are commensurate with the relative value of the *funding*.

PROCEDURES**A. Naming or Renaming Application Process**

1. Applicants and proposers (including *City Sponsored* and/or *City Recognized Support Groups*) shall submit their *naming or renaming* proposal to the *Department Director* depending on asset type.
2. If applicant's proposal follows the intent of this Council Policy, the *Department Director* shall make a proposal in writing for *naming or renaming* of a *City Asset* as follows:
 - a. For library facilities, the *Department Director* will make the proposal to the Board of Library Commissioners.
 - b. For parks and *recreational facilities*, the *Department Director* will make the proposal to the Park and Recreation Board.
 - c. For other *City Assets*, the *Department Director* will make the proposal to the appropriate Deputy Chief Operating Officer for the City Facility for which the *naming or renaming* is proposed.
 - d. Other City staff may review and provide input on the proposal for *naming or renaming*.
3. Written proposals must, at a minimum, include the following information:
 - a. The proposed name;
 - b. Reasons for the proposed name, including a discussion of the criteria identified in this policy;

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- c. The amount of the *donation* or *funding* provided for the *City Asset*, if applicable;
- d. Written documentation outlining community support for the proposed name; and
- e. If proposing to *rename* a *City Asset*, justification for changing an established name.

B. Naming and Renaming Review Process

1. Upon receipt of a *naming* or *renaming* proposal for any *City Asset*, the *Department Director* reviewing the *naming* or *renaming* proposal shall consider the following items in the review, including but not limited to, the following:
 - a. Submit the proposal to appropriate City historical staff to review the California Historic Resources Inventory Database (CHRID) to determine if the *City Asset* is a Designated Historical Resources with an assigned historic name;
 - b. Ensure that supporting information has been authenticated;
 - c. If the *City Asset* is a Designated Historical resource listed on the local, State or National Register of Historic Places, any on-site recognition shall comply with the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and shall be reviewed and approved by the City's Historical Resources staff according to those standards;
 - d. Ensure compliance with Charter section 225 (Mandatory Disclosure of Business Interests);
 - e. Consider the impact of the *naming* or *renaming* to the community; and
 - f. Consider the cost of implementation and signage, and identify the *funding* to cover such costs.
2. The *Department Director* will submit the proposal to the City Attorney's Office for legal review of the following issues that include, but are not limited to:
 - a. Ownership rights, by agreement or by law; and

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- b. Adherence to City policies, such as the San Diego Charter and SDMC, as well as any local, state, or federal regulation.
- 3. For all *City Assets* other than a library or park that do not involve *funding*, the *Department Director* will submit a recommendation to the Assistant Chief Operating Officer, Chief Financial Officer, or Deputy Chief Operating Officer as appropriate for review. The *Department Director* will submit the proposal for final approval of *naming* or *renaming* to the Chief Operating Officer. Prior to approval, City staff will notify the applicable Council District(s) and publish a notice with 30 days for comments by the public that will be taken into consideration by the Department Director following the process outlined herein.

If a *naming* or *renaming* request is for a library or park and does not involve *funding*, then the *Department Director* will advise the applicable board or commission who will invite comments from relevant community groups or associations.

C. The City, in its sole discretion, may:

- 1. Reject *naming* or *renaming* proposals or remove existing *naming* that portray or include depictions, words, or phrases that the City reasonably deems to be harmful, controversial or otherwise do not support the guiding principles stated in this policy; and
- 2. Reserve the right to rename any *City Asset* for any reason, for instance if the resident, organization, or business for which it is named turns out to be disreputable, becomes disreputable or does not otherwise support the Guiding Principles set forth in this Policy.

FUNDRAISING GUIDELINES

From time to time, the City may receive offers for outside support groups to identify donors to fundraise for specific *City Assets* in exchange for *naming* rights. *City Sponsored or Recognized Support Groups* intending to fundraise (excluding *Donor Acknowledgement* programs) for multiple *naming* rights or major projects must take the following steps:

- 1. Develop recommendations for *naming* opportunities with gift levels prior to receiving gifts and offering *naming* rights to prospective donors.

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2. Draft and submit recommended *naming* opportunities with gift levels to the *Department Director* for review.
3. Upon receipt of recommended naming opportunities with gift levels, the *Department Director* reviewing the *recommendation* will consider the following items in the review, including, but not limited to, the following:
 - a. Submit the request to appropriate City historical staff to review the City's CHRID to determine if the *City Asset* is a Designated Historical Resource with an assigned historic name;
 - b. Ensure that supporting information has been authenticated;
 - c. If the *City Asset* is a Designated Historical Resource listed on the local, State or National Register of Historic Places, any on-site recognition shall comply with the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and shall be reviewed and approved by the City's Historical Resources staff according to those standards;
 - d. Ensure compliance with Charter section 225 (Mandatory Disclosure of Business Interests);
 - e. Consider the community impact;
 - f. Consider the impact of the *donation* or *funding* to the completion of a project, if applicable; and
 - g. Consider the cost of implementation and signage, and identify the *funding* to cover such costs.
4. The *Department Director* will submit the proposal to the City Attorney's Office for legal review of the following issues that include, but are not limited to:
 - a. Ownership rights, by agreement or by law; and
 - b. Adherence to City policies, such as the San Diego Charter and SDMC, as well as any local, state, or federal regulation.
5. Upon completion of the above steps, the *Department Director* will work with the City Attorney to prepare a draft agreement with the *City Sponsored or Recognized Support Group*.

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6. Upon approval by the *Department Director*, the *City Sponsored or Recognized Support Group* will submit the recommended *naming* or *renaming* opportunities with gift levels and draft agreement to the corresponding board or commission.
7. Upon approval by the board or commission, the *Department Director* will submit the final draft recommendation on the *naming* or *renaming* opportunities with gift levels along with the draft agreement to the City Council for final approval. Only after City Council approval may the *City Sponsored or Recognized Support Groups* begin soliciting and accepting donations for *naming* or *renaming* rights.
8. No final commitment to name a *City Asset* or portion thereof shall be made to a potential donor without the final approval by the *Department Director* and Assistant Chief Operating Officer or Chief Operating Officer. *Naming* or *renaming* rights that include *funding* will have final approval by City Council.

HISTORY:

“Naming of City Assets”

Adopted by Resolution R-311043 – 04/13/2017



Katherine Johnston

Chair

Balboa Park Committee

-by email -

Dear Chair Johnston and members of the Balboa Park Committee

Actively encouraging philanthropic support within Balboa Park is extremely important. Clear, well defined recognition as an element of donor relations is key to ensuring that current donors are well served and that future donations are inspired.

Effective donor relations are paramount for all non-profit organizations within Balboa Park. It is our understanding that the Balboa Park Conservancy has worked with the Parks and Recreation Department on the proposed recognition opportunities for the Botanical Building and that they comply with the City's donor recognition policy.

As such, the Balboa Park Cultural Partnership is pleased to support this proposal.

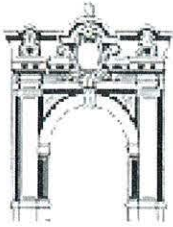
Peter Comiskey

Executive Director

11/30/20

Collaborative for Arts, Science & Culture





THE COMMITTEE OF ONE HUNDRED

Working to preserve Balboa Park's historic architecture, gardens, and public spaces since 1967

1649 El Prado, Suite 2 • San Diego CA 92101

November 18, 2020

TO: BALBOA PARK COMMITTEE
FROM: BALBOA PARK COMMITTEE OF 100
RE: DONOR RECOGNITION AND NAMING RIGHTS, BOTANICAL BUILDING

At its Nov. 16 board meeting, the Balboa Park Committee of 100 reviewed the Balboa Park Conservancy's plans for donor recognition and naming rights for the Botanical Building project.

The board generally approved of the plans for 13 naming-rights locations and the approach to donor recognition.

It was pleased to hear that the Lily Pond has been removed as a naming rights opportunity and that the 13 remaining naming rights locations on plaques and raised and engraved letters could be removable in the future as conditions warrant. We do think it's worth considering changing the Lily Pond name to its 1915 original, La Laguna de las Flores. It's also true that the proposed pergola was known from about 1916 to 1920 as Leap Year Court, where women would propose to men during Leap Year!

The importance of philanthropy is crucial to the success of Balboa Park's continuing improvement and enhancement. But it is also important to avoid intrusive recognition that spoils the visitor's experience and detracts from the public park nature of the setting.

The Balboa Park Conservancy's success will give us confidence that a similar fund-raising drive can succeed for the restoration and enhancement of the Palisades, C100's principal focus for the next few years.

Roger Showley, President
Balboa Park Committee of 100

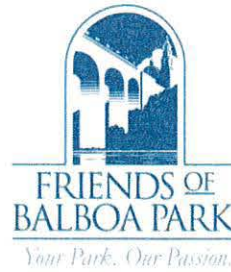
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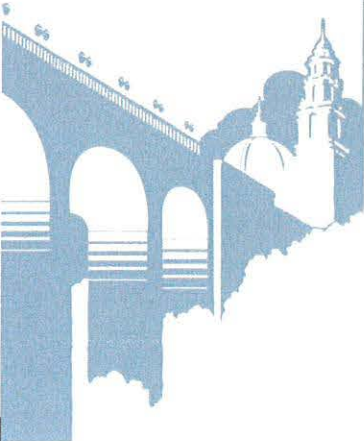
Position Statement on the Donor Recognition Program for the Botanical Building

Friends of Balboa Park is pleased to support the Balboa Park Conservancy's vision for establishing naming opportunities for elements within the Botanical Building. We believe the proposal presented tonight aligns with San Diego City Council policy on donor recognition of City assets; has been developed via partnership with the Parks & Recreation Department; effectively honors the unique historical elements of Balboa Park; and reflects best practices in the stewardship of philanthropic support. The success of the efforts to see the historic Botanical Building restored to its past glory will only be possible if the philanthropic community can be incentivized with meaningful and mutually-beneficial donor recognition programs like the one before you tonight, and we encourage others to support its vision and goals.

Submitted for the public record at the November 5, 2020, meeting of the Balboa Park Committee

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December 1, 2020

Dear Members of the Balboa Park Committee,

The Old Globe supports the naming plan for Balboa Park's Botanical Building. Naming opportunities are a well demonstrated way of obtaining philanthropic support. The Old Globe found tremendous success in capital fundraising with the naming indoor and outdoor spaces and continues to raise funds through recognition on plaques, seats, and other displays.

Tasteful and visible recognition is very important to a number of donors and is in keeping with successful fundraising for all nonprofit endeavors. It provides a place of pride for donors, encourages others to give, and is a way of commemorating long lasting gifts for future generations of Park attendees.

We wish you much success in this campaign.

Sincerely yours,

A handwritten signature in blue ink that reads "Llewellyn Crain".

Llewellyn Crain
Director of Philanthropy

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PRESIDENT & CEO

Mark A. Stuart, CFRE

November 23, 2020

To: Balboa Park Committee

RE: Donor Recognition and Naming Rights, Botanical Building

Dear Balboa Park Committee,

The San Diego Foundation is proud to give unqualified support to the Balboa Park Conservancy's efforts for establishing naming opportunities for elements within the Botanical Building.

The Balboa Park Committee's partnership with the Parks & Recreation Department has helped create a viable plan for appropriate naming recognition for those who support this important project.

Proper and effective stewardship of philanthropic support is essential to maintaining strong relationships with donors, and meaningful naming opportunities are a powerful way to engage those who make projects like these a reality through their generous charitable giving.

The San Diego Foundation looks forward to following the progress of this important effort.

Best regards,



Mark A. Stuart, CFRE
President and CEO