



5469 E. Olive Avenue
Fresno, California 93727
Telephone (559) 253-7324
Fax (559) 456-3194
www.sjrc.ca.gov

GOVERNING BOARD

The Honorable
Mike Dages, Chair
Council Member, City of Fresno

The Honorable
Susan Anderson, Vice-Chair
Fresno County Board of Supervisors

The Honorable
Frank Bigelow
Madera County Board of Supervisors

The Honorable
Gary Svanda
Council Member, City of Madera

Frank Franco, *Board Member*
Fresno Metropolitan
Flood Control District

Carl Janzen, *Board President*
Madera Irrigation District

William Loudermilk,
Regional Manager
Department of Fish and Game

Jess Cooper,
Sector Superintendent
Department of Parks & Recreation

John Donnelly, *Executive Director*
Wildlife Conservation Board

Patrick Kemp, *Assistant Secretary*
Resources Agency

Paul Thayer, *Executive Officer*
State Lands Commission

Michael C. Genest, *Director*
Department of Finance

Bryn Forhan
Duane Furman
Alice Saviez
Citizen Representatives

Melinda S. Marks
Executive Officer

Arnold Schwarzenegger, Governor
STATE OF CALIFORNIA

Donor and Sponsor Recognition Guidelines

Approved by the San Joaquin River Conservancy Governing Board
March 13, 2008

BACKGROUND:

The Conservancy appreciates and fosters donations and charitable gifts that contribute to the development of the Parkway. As of March 2008, no formal or consistent donor recognition or conservation-area and project naming practices had been adopted by the Board. Conservancy properties are often referred to by the sellers' names, and some projects bear donors' names.

November 8, 2007, the Board created an ad hoc committee to review and recommend donor and sponsor recognition practices, including the practice of naming Parkway lands and facilities for sellers, donors, sponsors, and honorees. Members serving on the committee were Frank Bigelow (Madera County Supervisor), Mike Dages (Fresno City Council member), John Donnelly (California Wildlife Conservation Board), Bill Loudermilk (California Department of Fish and Game), and Jess Cooper (California State Department of Parks and Recreation).

After meeting twice to discuss issues and alternative approaches, the Board ad hoc committee developed a consensus recommendation for guidelines that generally:

- Emphasize appropriate on-site and off-site recognition for sponsors and donors, and de-emphasize permanently naming lands or facilities for monetary contributors;
- Reserve to the Board the privilege and authority of naming or dedicating a site or facility on Conservancy lands or funded by the Conservancy;
- Encourage names for Parkway areas and features based on history, tradition, environmental setting, or other unique characteristics;
- Provide that facilities, trail segments, restored woodland groves, or other improvements may be dedicated to a donor or sponsor.

The San Joaquin River Conservancy Act clearly provides the Conservancy broad authority with respect to lands under its control. The Conservancy can exercise independent authority over naming its lands, projects, and features; displaying recognitions and signs; and acknowledging and publicizing donors, sponsors, and partners.

Appropriately paying tribute to charitable contributions is important to encourage and sustain support and philanthropy. Landowners sell their land to the state for public use with an appreciation for the legacy they are creating. Approximately five percent of the value of the land owned by the Conservancy for the Parkway has been donated to the Conservancy; additional, much more valuable land donations have been made from private landowners to the River Parkway Trust. Approximately thirty-five percent of the cost of public access and recreation improvements within the Parkway has been donated or awarded by private individuals and foundations.

Most Conservancy properties are informally referred to by the sellers' names. Among those, Ball Ranch, a family name, was in common usage long before the Conservancy purchased the property. Wildwood Native Park and Ledger Island are other examples of long-recognized or historic geographic names.

Regardless of whether land is purchased at fair market value or includes a donation to the Conservancy, sellers have been allowed to name a new Parkway area if they have requested that privilege during negotiations. As examples, the Moen family requested the Conservancy use the established "Sycamore Island" for property they had owned, and the Board has approved naming a future improvement or feature on the Gibson/Knobloch property to honor Mr. Rue Gibson.

Significant contributors to the Parkway have been acknowledged by naming projects in their honor. The Coke Hallowell Center for River Studies, owned by the River Parkway Trust, recognizes the significant long-term contributions and leadership of Mrs. Hallowell, the President of the Parkway Trust's Board of Directors (the Conservancy granted approximately 14% of the project cost to the Trust). The Lewis S. Eaton Trail recognizes the significant community and Parkway contributions of the late Mr. Eaton. The Fresno City Council adopted a resolution naming all segments of the Parkway multiple purpose trail within the city boundary for Mr. Eaton. Parkway improvements named for and by donors include the Tom Mac Michael Sr. Trail on Conservancy land, funded by a donation from the family as well as public funds.

Smaller scale examples include trail benches and picnic tables purchased and installed by the River Parkway Trust with donor funds. These often include a small memorial or acknowledgement imbedded on the item.

The River Parkway Trust actively solicits donations for Parkway capital improvements, and is conducting a major capital fund-raising campaign. The *Take Me to the River* campaign (2008) includes fund-raising for picnic shelters, outdoor classrooms, trailheads, kiosks, interpretive signs, benches and picnic tables, and other facilities planned for the Trust's lands at the Coke Hallowell River Center and Owl Hollow, and for the Conservancy's lands at Jensen River Ranch and River West. The Trust is also soliciting donations to contribute toward buying conservation lands.

The draft guidelines were reviewed by Dave Koehler, Executive Director of the River Parkway Trust. The potential for the donors to name a donated feature or area in order to recognize individuals, families, or entities is considered an important incentive. The ad hoc committee considered the Parkway Trusts' comments and concerns and made revisions to the guidelines to the extent the committee felt was appropriate.

The potential pitfalls of permanently naming public facilities primarily based on financial contributions are illustrated in recent news. In the 1960's, a popular park and school in

Sacramento were named after a local philanthropist, Charles Goethe. Charles Goethe was also a racist whose advocacy helped lead to the forced sterilization of 20,000 Californians.¹ The school's name has been changed and community activists are now calling for the removal of Goethe's name from other public places.

PROPOSED CONSERVANCY RECOGNITION GUIDELINES

I. Recognition for Parkway Donors, Contributors, and Partners.

Donors and contributors to Conservancy-funded projects or projects on Conservancy lands will be acknowledged through appropriate and proportionate recognitions, on-site and/or off-site, temporary or permanent.

- A. Off-site recognitions shall include, but are not limited to: thank you letters from the Board chairperson; resolutions of appreciation from the Board; mentions in news releases about the project; media event displays and programs; Conservancy website information; and commemorative items given to the donor.
- B. On-site recognitions may include temporary or semi-permanent signs, donor boards, plaques, and displays. Donor recognition may be included in interpretive signs as appropriate to the signs' message.

If a land acquisition or project is collectively funded by donors and other sources, a temporary donor recognition board shall be placed at the facility for the first six months the area is open to the public.

The Conservancy will make no guarantee that plaques or recognition signs will be maintained or replaced if damaged. Conservancy maintenance priorities shall be based on public need and benefit. The Conservancy shall have no obligation to maintain or replace signs, plaques, structures, or facilities if they are vandalized, lost, stolen, damaged, destroyed, or need to be relocated.

- C. All signage, displays, and materials used to recognize contributors shall be consistent with the Conservancy's and partner agencies' Use Guidelines for the San Joaquin River Parkway Brand.
- D. Corporate logos for donor entities may be used on temporary materials and semi-permanent signs in conjunction with the logos of other partners. Advertising slogans may not be included.
- E. Donations shall not entitle the donor or sponsor to any special privileges.
- F. If an organization is raising funds for capital development or encouraging volunteer participation in stewardship and operation of the Parkway, the Conservancy may allow the campaign materials to include a message from the Board chairperson commending and endorsing the organization's efforts.

¹ As reported on National Public Radio.

- G. The Conservancy governing board may decline a contribution, including but not limited to those from donors associated with products and practices that may be of concern to the Conservancy's constituents (typical examples could be tobacco and alcohol products). The Conservancy shall not accept direct donations from persons or entities opposing the state in on-going litigation or persons or entities who are seeking a contract, lease, or business benefit. The Conservancy shall not accept direct donations when acceptance would create a conflict of interest; when the conditions placed on the donation are inconsistent with the Conservancy's mission, plans, or purposes; or if the donation seeks to circumvent laws, regulations, or government policies. Requests for donor anonymity shall be respected, provided that such confidentiality does not conceal a potential, real, or perceived conflict of interest or similar ethical concern.

II. Recognition for Operational Sponsorships.

Operational sponsorships (i.e., year-to-year or term-based operations funding commitments) and long-term endowments shall be acknowledged through appropriate and proportionate recognitions.

- A. Off-site recognitions shall include news releases, website information, and Board commendations.
- B. On-site recognition shall be a semi-permanent display or sign maintained by the Conservancy for the duration of the sponsorship, or permanently maintained in the case of an endowment. As examples the signage could say, "Root Creek Trail, operated through the assistance of Recreation World," or "Kit Fox Canyon, made possible by the Karing Korporation."

C. Endowments.

Endowments to provide a permanent source of annual funding for future programs, management, operations and maintenance costs should be included in any capital fund-raising campaign, especially those associated with major capital improvements such as visitor centers, trails, fishing and boating access sites, and new parks. Donors and sponsors can achieve long-term recognition by establishing endowments.

Endowments for Conservancy projects and programs must be established through a written agreement with a tax-exempt partner that can invest and manage the endowment in accordance with professional financial management standards. The agreement must: 1) provide that the funds can only be used for Conservancy Parkway purposes, 2) describe procedures to determine the amount of annual funding available and the decision-making process for expenditures, 3) include a survival provision in the event that changed circumstances render the designated use inappropriate or impractical or the nonprofit partners becomes unable to administer the endowment, and 4) provide a surety or guarantee for the principle funds.

Endowments adequate to manage an area or project for its long term intended Parkway use may be considered for special recognition by the Board in dedicating

an area, project or feature to the donor or donor's honoree; see items IV. B. and V. B. below.

III. Naming Conservancy Lands and Parkway Areas.

Naming Conservancy Parkway lands shall be a privilege reserved specifically to the Conservancy governing Board. Names shall be selected and approved by motion of the Board with input from the Interagency Project Development Committee and with opportunity at the Board meeting for public comment, and generally shall be based on geographic, historic, cultural, or environmental characteristics. The Board may name an area after an individual, family, or organization that has made a significant Parkway-wide or regional contribution in support of the Conservancy's mission, including significant donations of land value to the Conservancy and/or operational endowments to benefit the public and Parkway.

- A. The Conservancy shall adopt by approved motion of the Board temporary or permanent names for new unimproved areas based on location, association, history, natural features, general usage, or in rare instances to recognize an honoree of Parkway-wide significance. Subsequently, a new name may be adopted by approval of the Board as the property's development is planned for habitat, public access, and recreation, and in association with California Environmental Quality Act review.
- B. Subject to specific approval of the Board, the area may be named to honor an individual, family, or organization, if the donor has established an endowment adequate to manage the site for its interim or long term intended Parkway use.
- C. Names for unnamed areas and areas with temporary designations may be nominated to the Board through the Interagency Project Development Committee as a part of the improvement planning process. Those names shall be based on location, association, history, natural features, general usage, or (rarely) an honoree of Parkway-wide significance, and as otherwise allowed in these guidelines.
- D. Background biographical or historical information for any nominated individual or organization shall be presented in the report to the Board, and the public will have the opportunity to comment at the Board meeting.

IV. Naming Projects and Features.

Naming Parkway projects, structures, and facilities—trails, trailheads, picnic shelters, outdoor classrooms, visitor centers, groves, etc.—on Conservancy lands shall be a privilege reserved specifically to the Conservancy governing Board. Names shall be selected and approved by motion of the Board with input from the Interagency Project Development Committee and opportunity at the Board meeting for public comment, and shall be based on geographic, historic, cultural, or environmental characteristics. The Board may dedicate a project, structure, or facility to an individual or organization that has made a significant contribution to the Parkway and/or project in support of the Conservancy's mission, including by donating funds, in-kind services, and/or operational endowments. In most cases the honoree's name shall be secondary to the project name describing the purpose of the site, geographic or historic name, site environment or

characteristics, or common usage, i.e., the “Cottonwood Creek Picnic Shelter, dedicated to Jane Generous” or “Lanes Bridge Picnic Area, made possible by Joe Donor.”

- A. As an incentive to encourage landowners to embrace the Parkway as a legacy for their families, land sellers shall be allowed to request a specific name for a future project, structure, or facility for Board consideration. This negotiable request will be entertained whether or not the sellers have donated land value or an endowment, and may or may not be approved at the Board’s sole discretion.
- B. Subject to specific approval of the Board, a future project, structure, or facility may be dedicated to a seller, donor or donor’s honoree, if the seller or donor has established an endowment adequate to manage the project for its long term intended Parkway use.
- C. Donations Associated with Buying Land
 - 1) Subject to specific approval of the Board, a future grove, trailhead, or other feature or facility may be dedicated to the landowner/seller or seller’s honoree, if the seller has either donated land value to the Parkway equal to 2.5 percent² of the total value of the acquisition or equal to the present value of two acres of land (currently approximately \$50,000).³
 - 2) Subject to specific approval of the Board, a future grove, trailhead, facility, or other feature may be dedicated to a donor or donor’s honoree, if the donor has donated to the Conservancy an amount equal the present value of two acres of land.
- D. Donations Associated with Improvements

Subject to specific approval of the Board, new Parkway facilities, structures, or features may be dedicated to a donor or honoree, if the donor either funds greater than 50 percent of the construction cost of the improvement, or has made a donation to the project of \$50,000 or greater.
- E. Background biographical or historical information for any nominated individual or organization shall be presented in the report to the Board, and the public will have the opportunity to comment at the Board meeting.
- F. Any memorial sponsored by a donor may include only the name of the person honored, not dates, the donor’s name, or personal information.
- G. Landscape, geographic, and geological features, shall not be named to honor donors or individuals (apart from historical names).

² 2.5 percent of a two million dollar acquisition is \$50,000.

³ The amounts shown in C. and D. could be scaled lower or higher. For consideration, the average present value for of one acre of land equals \$20,000 plus purchase costs; picnic shelters range in cost from \$100,000-\$400,000; major “gateway” trailheads are budgeted at \$250,000; outdoor classrooms range from \$10,000-\$70,000; kiosks are budgeted at \$25,000.

- H. Conservancy staff, the Board, or any fund-raising organization must not commit to donors that a project will be constructed or installed if the project has not been approved by the lead agency pursuant to the California Environmental Quality Act, or if the balance of project funding has not been authorized.
- I. Donors shall be advised that there is no guarantee a recognition or dedication is permanent. The name may be removed or replaced at the Board's discretion after an established time, when the facility is renovated, or for other reasons.

V. Recognitions Associated with Standard "Catalog" Items.

The Conservancy will work with nonprofit partners to develop an on-going inventory of standard items needed for specific projects and for specific locations, and will allow for semi-permanent plaques on the donated items and for temporary donor recognition displays to acknowledge the contributions.

- A. Contributors which fully pay for standard items such as benches, picnic tables, and interpretive signs shall be allowed to affix small permanent markers identifying their name or the name of their honoree. Donor-funded interpretive signs will note that the signs are made possible through the generosity of the donor.
- B. Any memorial plaque sponsored by a donor may include only the name of the person honored, not dates, the donor, or personal information.

VI. Recognitions Associated with Local Assistance Grants and Grants to Nonprofits.

When the Conservancy has provided a grant to another state agency, local agency, or nonprofit partner, and the funding comprises the majority of project costs (greater than 50%) the Conservancy's recognition and naming policies shall apply, and the Conservancy governing board must approve any proposed name, sponsorship recognition, or dedication for that project. For all Conservancy grants for less than a majority of project costs, the grantee shall take into consideration the Conservancy's guidelines; however, the grantees' own policies may prevail. Grant agreements, administered by the Wildlife Conservation Board (WCB), require WCB approval of the project sign, including donor and sponsor acknowledgements. In addition the Conservancy will provide publicity, commemorations, and other off-site forms of recognition as appropriate.

STATE POLICY CONTEXT

Other state resources agencies' recognition and naming policies were used to inform and shape the Conservancy's guidelines.

California Department of Parks and Recreation (DPR) Guidelines

The Department of Parks and Recreation provides administrative support to the Conservancy via an agreement; thus, the Conservancy's program development is influenced by DPR practices and policies. The DPR Donor and Sponsorship Recognition Guidelines provide a well-developed statewide approach to recognizing donors for public conservation and public use facilities. DPR's policies include the following principles (in part):

- The policy expresses and reinforces the state's appreciation for gifts and memorials for park units and their contribution to further DPR's mission.

- DPR prefers to express appreciation for contributions by giving something to donors or sponsors rather than by forms of recognition to be displayed in a park.
- Where a physical form of on-site recognition is deemed appropriate, temporary and transient forms of recognition are preferred.
- Park areas, facilities, and features are generally named for the geographic, natural, or cultural character of the individual unit.
- Facilities and structures may be named in recognition of donors, but such recognitions are subordinate to names that describe the facilities' purpose or make use of historic or geographic names (e.g., "Cottonwood Creek Picnic Area, made possible by Jane Generous").
- Temporary or permanent recognitions, such as signs or plaques, must not detract from the park's values or interpretive messages.
- Under no circumstances are temporary or permanent recognitions affixed to cultural or natural resources of a site, or located where they would intrude on the historic or natural character of an area. The cumulative proliferation of recognitions and unnecessary visual clutter are avoided.
- Recognition of corporate donations or sponsorships must not in any way suggest the endorsement of the state, nor give the impression to park visitors of advertising, commercialization, solicitation, or a proprietary interest in the unit. Advertising promotions or corporate slogans are not generally permitted.
- Park concessionaires, lessees, government and private operators, cooperating associations, advocacy groups, and other park partners must follow the DPR recognition guidelines.
- DPR considers replacement costs for plaques and other forms of acknowledgement subject to damage when developing on-site recognition. Priorities for replacement and repair are determined by DPR based solely upon public need.

DPR selects a name for a new park area based on location, association, history, natural features or general usage. A park may also be named to honor a person (deceased), group, organization, or entity which has rendered services of statewide significance to state parks. Changing the name of an established park is strongly discouraged.

DPR reserves to itself the privilege of naming a structure or facility in honor of an individual who had a distinguished or unique relationship with the park. If the individual's involvement in the activities or history of the park could be an appropriate part of the interpretive program and the significance of their role would meet the test of time, then it would be appropriate to memorialize the individual. The individual should have been deceased for at least five years before the state can make the judgment of the significance of his or her role.

The policy states:

"Philanthropy occurs when donors believe that their decision to give is justified by the merits of the projects and nothing is expected in return other than the reasonable hope that the department uses these gifts as promised, and uses them to their full advantage."

DPR provides that new park facilities or structures may be named to honor donors and contributors when the contribution comprises the majority of the cost of the improvement. The name must be secondary to a name describing the purpose of the site, historic name, or common

usage. DPR has policies allowing segments of the trail system or natural areas to be identified as memorial or dedicated trails or groves to honor individuals and organizations who have contributed at least \$5,000 or comparable service for trail improvements. Permanent plaques are used to identify such features or areas.

DPR maintains a “catalog” program, identifying items needed within a park, such as picnic tables and benches, and allows donors to donate funds to purchase these standard items. Donors are recognized on display boards, in newsletters, on small plaques, and through other means.

DPR guidelines provide that sponsors providing limited-term operational support for specific projects or activities may be recognized on temporary signs posted for no more than six months.

Fish and Game Commission Policy

The Fish and Game Commission, which sets general policies for the conduct of the Department of Fish and Game, has adopted the following a policy:

“No fish hatchery, game refuge, wildlife area or any installation shall be named for any person, living or dead. Installations shall be named in a manner which will indicate their geographical location, avoiding as far as possible the names of local political units.”

Government Code Provisions

With the exception of unconditional gifts of money, every gift or dedication to the state of personal property or real estate (in fee title or easement) must be approved by the state Department of Finance, and every agreement to acquire property must be approved by the state Department of General Services (CGC §11005). These approvals are standard procedures accomplished for Conservancy acquisition and capital improvement projects.

Other State Policies

Although not directly applicable to Conservancy authorities, the state highway system provides an additional example of state recognition policies. Segments and structures within the state’s highway system can be named by resolution of the Legislature to honor individuals. The legislature’s Transportation Committee has adopted policies requiring (in part) that: the person being honored has provided extraordinary public service and has a connection to the community where the highway is located; the proposed designation represents a community consensus; the designee must have been deceased at least 18 months, or in the case of an elected official must be out of office.