

**ARIZONA HISTORICAL SOCIETY  
POLICIES AND PROCEDURES**

<b>Policy Number:</b> HIA B/B 310	<b>Issued:</b> 5/19/2026
<b>Subject:</b> Naming Rights Policy	<b>Effective:</b> 5/19/2026
<b>Policy Section:</b> Business and Budget	<b>Written:</b> 3/3/2026
<b>Policy Owner:</b> Arizona Historical Society	<b>Revised:</b>

This policy establishes the award of Naming Rights in recognition of significant philanthropic contributions. This policy does not create a contract for goods or services between the Arizona Historical Society and any donating entity: whether private or corporate, nor individual or collective. This policy does not remove the conditions to be considered for the award of Naming Rights at the Arizona Historical Society.

**Scope:** This policy applies to all Arizona Historical Society Employees, Board Members, Chapters, and Support Groups.

**Authority:** State of Arizona Accounting Manual 8020, The State’s Tax Exempt Status and the Receipt of Charitable Contributions, Arizona Revised Statutes (ARS) § 41-709 authorize state agencies to accept gifts, donations, and grants to support their operations or specific programs. Arizona state agencies are authorized to contract for services primarily through the Arizona Procurement Code (A.R.S. § 41-2501 et seq.). Specific authority for contracting services is outlined in A.R.S. § 41-2513. The agency’s unique authorities are outlined in A.R.S. § 41-826.

**Purpose:** The purpose of this policy is to outline the acceptable conditions and terms under which the agency may enter into an agreement with external parties for term-limited Naming Rights of assets owned by the Arizona Historical Society.

**Definitions:**

*Asset* – Those resources and programs, both real and intangible, which are owned by the agency. These shall include but not be limited to:

- Physical infrastructure: Buildings, new wings, permanent exhibition galleries, specific rooms, storage areas, and hallways; and
- Outdoor Spaces: Gardens, courtyards, and walkways; and

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- Specific Amenities: Theater seats, brick pavers, benches, gazebos, trees, and fountains; and
- Exhibitions: Temporary (rotating) galleries, or individual features.

*Board* – The State Board of Directors of the Arizona Historical Society.

*Commemoration* – Naming Rights offered that reflect significant contributions (philanthropic or otherwise) made by donor(s) in support of the agency.

- *Primary Philanthropic* commemoration refers to gifts that support major projects. It must be equal to or more than 50% of the total associated costs attributed to the stated agency project for that specific asset AND is in excess of \$250,000. Primary philanthropic commemorations may assign a singular naming right to an asset, or may assign principal naming rights to an asset with a recognition board or panel for that same asset.
- *Secondary Philanthropic* commemoration refers to gifts that support minor projects and programs. It may be less than 50% of the total associated costs attributed to the stated agency project for that specific asset AND is between \$25,000 and \$249,999. Secondary gift-based commemorations may assign multiple naming rights to an asset, such as through a recognition board or panel. Assigned naming rights for secondary gift-based commemorations may be tiered or otherwise differentiated from one another with respect to the size or significance of the gifts.
- *Lesser Philanthropic* commemoration refers to gifts describing specific amenities AND is less than \$25,000.
- *Legacy commemoration* refers to significant non-financial contributions made by individuals, families, or organizations in support of the agency.

*Delegated Authority* – Any AHS employee(s) or member(s) of the State Board so authorized to participate in and make determinations on Naming Rights awards, as confirmed in writing by the agency's Executive Director.

*Donor* – An individual, family, or organization that makes a philanthropic gift to the agency that qualifies as a philanthropic commemoration for Naming Rights.

*Honoree* – An individual, family, or organization approved as the subject for Naming Rights.

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*Naming Rights* – Permissions awarded to an honoree through which their name may be applied in various printed and non-printed media, including but not limited to signage, announcements, and published recognition statements, to a specific agency asset for a term-limited period of time.

*Naming Rights Agreement* – A written contract that describes the conditions of an award of Naming Rights based on significant philanthropic and non-philanthropic contributions.

*Subject Matter Expert (SME)* – An individual with deep, authoritative knowledge, skills, or experience in a specific topic, field, or technology.

**1. Roles and Responsibilities:**

1.1 The Delegated Authority of the agency shall:

- A. Be responsible for reviewing and determining Naming Right award nominations/inquiries, and overseeing the implementation of issued awards.
- B. Adhere to the instructions within this policy when engaging with external parties on the matter of Naming Rights.
- C. Submit its recommendations for final signatory approval to the Executive Director or his Deputy Assistant Director of Operations.

1.2 All agency employees and Board members shall:

- A. Become familiar with this policy and its related procedures; and
- B. Refer all non-general inquiries and conversations on the matter of Naming Rights to the Delegated Authority; and
- C. Not engage in any negotiations or conversations with external parties on the matter of Naming Rights.

**2. Policy:**

2.1 The Delegated Authority of the agency will have the authority to negotiate and make recommendations for approval of the naming of assigned departmental assets for individuals or organizations. The Delegated Authority shall prescribe a committee of staff, describing:

- A. Executive Staff member
- B. Three department managers

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- C. One Subject Matter Expert (SME) befitting the proposed asset

2.2 Naming of all assets may be applied for donor(s), and shall be accomplished in accordance with a written Naming Rights Agreement or the guidelines set forth below.

- A. Identified conditions shall include, but not be limited to, a hard valuation of the obligated philanthropic gift that is commensurate with the nature of the asset, definition of the particular agency asset subject to Naming Rights, the applicable term of duration for awarded Naming Rights, the specific media through which Naming Rights will be applied, the schedule for issuance/installation of Naming Rights for the asset, and the schedule for disbursement of the designated philanthropic gift.

2.3 The agency shall develop and maintain an appropriate internal review mechanism in accordance with this policy, records retention schedule and applicable laws and rules.

2.4 For all commemorative Naming Rights through which an asset may be renamed or a previously-assigned name may be rescinded, the Delegated Authority shall prescribe those conditions in an executed Naming Rights Agreement.

2.5 For a legacy commemorative Naming Rights award, the AHS Executive Committee of the AHS State Board shall also be included by the Delegated Authority for a secondary review, after its initial recommendation, via a formal action at a scheduled meeting of the Executive Committee.

2.6 Appropriate recognition shall be provided to all honorees.

2.7 Naming Conventions:

- A. When considering a Naming Right award, the asset for Naming Rights must be available for naming and not otherwise encumbered.
  - i. When considering a Primary, Secondary, or Lesser commemorative Naming Right award, the philanthropic gift should directly support the immediate maintenance or advancement of the agency goals for the identified asset.
  - ii. When considering a legacy commemorative Naming Right award, the proposed honoree(s) shall have first achieved distinction in support of the agency AND demonstrate a clear association with the identified asset.

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- B. Prior to recommending for approval the naming of an asset for an honoree, the Delegated Authority shall demonstrate a reasonable assurance - through a combination of public data gathering and comprehensive research and stakeholder consultation - that:
  - i. The donor and, as applicable, philanthropic gift are in good standing, not subject to any active investigation, or otherwise gained through proven illegal behavior; and
  - ii. The proposed name will bring additional honor and distinction to the agency; and
  - iii. The proposed name does not conflict with or supersede any existing copyrights or trademarks not otherwise held and released by the donor or honoree for the purposes of the naming; and
  - iv. Any philanthropic commitments connected with the naming have been realized in full.
- C. All Naming Rights shall be term-limited, and so documented within the vote of the agency Board of Directors for legacy commemorations and in the terms of the written Naming Rights Agreement for all commemoration awards.
  - i. With special exception as provided by the Delegated Authority, Naming Rights shall not exceed a period of twenty (20) years or until the next renovation is needed.
  - ii. Should the asset designated for Naming Rights require demolition, significant renovation, or if the purpose of the asset significantly changes within the prescribed period, the donor shall be notified no less than thirty (30) days prior to the proposed action. In such cases resulting from a fault or controlled determination of the agency employees or Board, the agency will work with the donor on a mutually beneficial solution.
- D. In the avoidance of potential Conflicts of Interest, serving Board members, elected officials, and current agency employees are not eligible for the award of Naming Rights. The friends and family of the Board, elected officials, and agency employees are also not considered. The Delegated Authority may consider exceptions if:
  - i. Unusually and exceptional meritorious reasons justify the naming; and
  - ii. The associated individual(s) within the Delegated Authority claiming a Conflict of Interest abstain from the deliberation and determination; and

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- iii. The nomination for the award of Naming Rights is submitted by a person other than the proposed honoree.
- E. The agency's established procedures for donor recognition, including but not limited to receipts of donation and inclusion in the quarterly *Journal of Arizona History* and Annual Report, shall apply for any philanthropic gifts determined as qualifying for Naming Rights.
  - i. The agency shall provide the donor with a verification of any Naming Rights implementation and the demonstrated expenditure of the philanthropic gift toward the stated agency project for that specific asset within thirty (30) days of the project's completion.
- F. Any direct or indirect violation of the above-referenced guidelines, either by the agency employees or Board or by the honoree, may be cause for the termination and revocation of Naming Rights.
  - i. A revocation may be appealed to the Delegate Authority for consideration no more than thirty (30) days after notice of termination of the Naming Rights award.
  - ii. In the case of terminations issued for fault of the agency employees or Board, the agency will work with the donor on a mutually beneficial solution.
- G. Any Naming Right award shall be codified via an executed Naming Rights Agreement (Primary, Secondary, Lesser, and Legacy commemorations), which shall include a succession clause to identify an authorized designee in the event that the assigned duration of the awarded Naming Rights exceeds the life of the donor, AND to also include a vote by the Executive Committee of the AHS State Board (Legacy commemorations).
  - i. The identified successor shall hold no rights or claim to request a renaming of the associated asset away from the present honoree
- H. Any Primary, Secondary, or Lesser commemorative Naming Rights shall comply with current 501(C)3 regulations and guidelines, and ensure that the award of Naming Rights is recorded as a gift and not a taxable exchange of goods or services.

**3. Maintenance and Upkeep:**

3.1 Upon issuance of Naming Rights, agency employees are responsible for the dutiful and timely implementation of the Naming Rights on the designated asset, to the best of their abilities.

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Assignment of responsibility is commensurate with the general duties and areas of departmental oversight of employees.

3.1.1 The timely nature of implementation is defined as no more than sixty (60) days after the completion of the associated work on the identified asset; or

3.1.2 If no associated work on the identified asset is required, this definition is within sixty (60) days of the execution of the Naming Rights Agreement.

3.1.3 Force Majeure exempts the timeliness of these obligations. In such cases, agency employees shall provide the donor with regular updates as information becomes available.

3.2 Agency employees are responsible for the reasonable upkeep and maintenance of associated media featuring the implemented Naming Rights, and shall notify the donor or their representatives of any changes in status.

**4. Consequences for Non-compliance:** Agency employees who fail to comply with established Naming Rights policies and procedures may be subject to discipline, dismissal, or legal reprisal.

4.1 Agency Employees - State Personnel System (SPS) Rule R2-5A-501, Standards of Conduct, requires that all employees comply with federal and state laws and rules, statewide policies, employee handbook, and agency policy and directives. As provided by SPS Rule R2-5A-501(C), an employee who fails to comply with standards of conduct requirements may be disciplined or separated from state employment.

4.2 Agency Contractors - Agency contractors violating federal and state laws and rules, statewide policies, and agency policy and directives may result in, but not be limited to, immediate credential revocation, terminations of permissions for access to data systems and physical locations, and barring entry or access permanently. Vendors providing services under a contract are subject to vendor performance reports, and any contract terms and warranties, including potential damages.

**Related Document/Forms**

1. Eligibility for Determination checklist
2. Naming Rights Agreement
3. Expenditure Report
4. Naming Rights Revocation Appeal
5. Policy Acknowledgement

Date Approved: 05/19/2026

Approved by: David Breeckner  
Dr. David Breeckner, Executive Director



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**ARIZONA HISTORICAL SOCIETY**  
**Checklist for Determination of Naming Rights**

- Establishment of the Delegated Authority, describing one (1) Executive Staff member, three (3) department managers, and one (1) SME
- Identification of the designated asset for naming award, and determination of its eligibility
- For Primary, Secondary, or Lesser Namings only:** Identification of the qualifying size of the philanthropic gift
- For Primary, Secondary, or Lesser Namings only:** Determination of relevancy of the philanthropic gift to the immediate maintenance or advancement of the agency's goals toward the designated asset
- For Legacy Namings only:** Identification of the unique distinction demonstrated by honoree in support of the agency to warrant the award
- For Legacy Namings only:** Determination of the clear association between the honoree and the designated asset
- Determination that the proposed name will bring additional honor and distinction to the agency
- Determination that the proposed name does not conflict with or supersede any existing copyrights or trademarks not otherwise held and released by the donor or honoree for the purposes of the naming
- For Primary, Secondary, or Lesser Namings only:** Determination of the good standing of the donor and gift, being not subject to any active investigation or otherwise gained through proven illegal behavior
- For Primary, Secondary, or Lesser Namings only:** Determination of the completion of gift disbursement prior to issuance of award
- For Primary, Secondary, or Lesser Namings only:** Determination that the gift complies with current 501(C)3 regulations and guidelines, and has been recorded as a gift and not a taxable exchange of goods or services
- Determination that no Conflicts of Interest exist in the proposed naming, including namings for serving Board members, elected officials, and current agency employees; OR
- If a Conflict of Interest exists: justify the naming exception AND the nomination for the award of Naming Rights has been submitted by a person other than the proposed honoree

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**Checklist for Determination of Naming Rights**

- Determination of the nature (media) through which Naming Rights will be applied (e.g. plaque, lettering, recognition board)
- Determination of the duration of the award, not to exceed twenty (20) years
- For Legacy Namings only:** Prior to recommendation to the AHS Executive Director or his Deputy Assistant Director of Operations, approval by the Arizona State Board of Directors' Executive Committee via a qualifying vote at a scheduled meeting, and so reflected within the minutes.
- Formal recommendation of Naming Rights award to the AHS Executive Director or his Deputy Assistant Director of Operations for final approval
- Execution of a Naming Rights Agreement



Exhibit A  
Naming Rights Terms

Gift Type

- Primary Commemoration (Exclusive Naming Rights)      Gift Amount: \$ \_\_\_\_\_  
Eligibility: A philanthropic gift equal to or more than 50% of the total associated costs attributed to the stated agency project for that specific asset AND is in excess of \$250,000.
  
- Secondary Commemoration (Shared Naming Rights)      Gift Amount: \$ \_\_\_\_\_  
Eligibility: A philanthropic gift that may be less than 50% of the total associated costs attributed to the stated agency project for that specific asset AND is between \$25,000 and \$249,999.
  
- Lesser Commemoration (Supportive Naming Rights)      Gift Amount: \$ \_\_\_\_\_  
Eligibility: A philanthropic gift benefitting a specific, small amenity (e.g. Theater seats, brick pavers, benches, gazebos, trees, and fountains) AND is less than \$25,000.
  
- Legacy Commemoration (Variable Naming Rights)  
Eligibility: A significant non-financial Gift made by Donor.

Honoree Name: \_\_\_\_\_ (limit 40 characters)

- Graphic to be provided by Donor

Asset for Naming: \_\_\_\_\_

Asset Facility: \_\_\_\_\_

Display Location: \_\_\_\_\_

Agreement Duration: \_\_\_\_\_ year(s)

Additional Notes/Exceptions: \_\_\_\_\_  
\_\_\_\_\_





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Naming Rights Revocation Appeal

Date: \_\_\_\_\_

To:

Address: \_\_\_\_\_

Email: \_\_\_\_\_

RE: Appeal of Naming Rights Revocation – \_\_\_\_\_

Dear Members of the \_\_\_\_\_,

I am writing on behalf of \_\_\_\_\_ to formally appeal the decision rendered on \_\_\_\_\_ to revoke the naming rights for \_\_\_\_\_ as outlined in the Naming Rights Agreement dated \_\_\_\_\_.

We received your notice on \_\_\_\_\_, stating that the naming rights were being terminated due to [cite specific reasons given in revocation notice, e.g., alleged violation of Section 5: Morals Clause].

We respectfully request a reconsideration of this decision based on the following grounds:

1. **Misinterpretation of Facts:** The actions cited in your letter do not align with the criteria set forth in our agreement. Specifically, [provide detailed explanation/evidence showing the accusations are false or misinterpreted].
2. **Lack of Material Breach:** The alleged incidents do not constitute a "disrepute" that brings harm to the [Institution Name] as defined in our contract, because [explain why].
3. **Corrective Actions/Context:** [If applicable, explain steps taken to mitigate the situation or provide context that was missing, e.g., "The individual in question is no longer associated with our firm..."]

Attached to this letter, please find \_\_\_\_\_ that support our position.

We are proud of our partnership with Arizona Historical Society and have acted in good faith throughout the term of this agreement. We believe this revocation is premature and based on incomplete information.



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We request a meeting with the Board or an appointed committee to discuss this matter further and provide any additional information needed to resolve this situation justly. Thank you for your time and fair consideration of this appeal.

Sincerely,

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Signature

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Title

---

Name

---

Organization


---

Date

**Acknowledgement:**

My signature below indicates that I have received and read the Arizona Historical Society Naming Rights Policy.

(Return this signed page only to Human Resources).

  
\_\_\_\_\_  
Employee Name (printed)

\_\_\_\_\_  
Employee EIN

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date