

SUBJECT	POLICY 94 (VISUAL IDENTITY)
MEETING DATE	APRIL 2, 2019

Forwarded on the Recommendation of the President

**APPROVED FOR
SUBMISSION**



for Santa J. Ono, President and Vice-Chancellor

FOR INFORMATION

Report Date	March 15, 2019
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Presented By Hubert Lai, Q.C., University Counsel
Robin Ciceri, Vice-President External Relations

EXECUTIVE SUMMARY

The proposed amendments to Policy #94 (the “**Policy**”) are intended to clearly establish the responsibility of UBC faculties, units, departments, staff and faculty members, to ensure that they appropriately and consistently use and apply UBC’s logos, typeface, brand colours and other brand elements (“**Brand Identity Elements**”) to UBC branded material in accordance with the library of resources published by the Brand and Marketing department (“**UBC Brand Identity Rules**”). The proposed amendments to the Policy include renaming the Policy to more accurately reflect the scope of the Policy as well as renaming the library of resources published to support appropriate use of UBC’s Brand Identity Elements from “guidelines” to “rules” to more accurately align with the intent of the Policy. The proposed amendments to the Policy include the addition of Procedures to the Policy. The administrative mechanism through which a UBC member may request a deviation from the UBC Brand Identity Rules has been moved into the Procedures. In addition, the Procedures: (a) clearly identify the UBC departments and/or units responsible for establishing and/or supporting UBC’s brand to enable UBC members to meet their responsibilities under the Policy; and (b) identify the resources available to support proper adherence to and consistent use of UBC’s Brand Identity Elements by UBC members. The proposed amendments also update administrative unit and position titles that have changed since the Policy was approved. The proposed amendments involve an extensive revision of the Policy; as such, a blackline version of the changes is not practical and has not been attached.

Attachments

1. A clean copy of proposed Policy #94.

A copy of the current policy is available at:
<https://universitycounsel.ubc.ca/files/2011/10/policy94.pdf>

STRATEGIC CORE AREAS SUPPORTED

- People and Places Research Excellence Transformative Learning Local / Global Engagement

**DESCRIPTION &
RATIONALE**

The current Policy was approved in 2003 and has not been amended since its approval. The Policy Review Committee (the “Committee”) identified a number of areas in the Policy that required amendment, particularly the need to: (a) more clearly articulate when and to whom the Policy applies; (b) enhance compliance with UBC Brand Identity Rules by establishing clearer language regarding the requirement of UBC members to appropriately and consistently use and apply UBC’s Brand Elements in the course of their UBC duties and to accurately identify themselves on all UBC branded material; and (c) more clearly identify the UBC branded material that is subject to the Policy, including expanding the types of UBC branded material that the Policy applies to.

The current Policy does not provide sufficient clarity to UBC members on the requirement to comply with UBC’s current “Visual Identity Guidelines”. Under the current Policy, the UBC Brand Identity Rules are referred to as “Visual Identity Guidelines”, which makes it unclear as to whether they are intended to be mandatory, or whether they are only “guidelines”. In addition, under the current Policy, the list of UBC branded material that is subject to the Policy is presented as an exhaustive list and omits material which the Committee determined should be included.

The Committee set out to update the Policy to ensure that it established clear responsibilities. The amended Policy enables compliance with UBC Brand Identity Rules by clearly defining the UBC members to whom the Policy applies as well providing clearer direction as to when and how UBC members are required to comply with the UBC Brand Identity Rules. In addition, the Committee renamed the library of resources published to support appropriate use of UBC’s Brand Identity Elements from “Visual Identity Guidelines” to “UBC Brand Identity Rules” to more accurately align with the goal of the Policy establishing unequivocal rules, rather than “guidelines”. The proposed amendment to the Policy clarifies when and which UBC members are subject to the Policy and there is no longer any ambiguity as to whether, and in which situations, UBC members are required to comply with the UBC Brand Identity Rules.


The amended Policy also expands and clarifies the scope of UBC branded material covered by the Policy. The definition of “UBC Branded Material” has been revised from an exhaustive list to an inclusive list that will not be limited to the material set out in the list. The broader definition also expanded to specifically include merchandise and apparel which is omitted from the current Policy.

The Committee has proposed the addition of Procedures to the Policy in accordance with other recently amended UBC policies to separate the administrative details required for the administration of the Policy from the Policy itself. The Procedures clearly identify the departments and/or units responsible for establishing and supporting the objectives of the Policy, including identifying the related brand identity activities for which they are responsible and the resources available to UBC’s members to support their compliance with the Policy.

The Committee recognized that certain UBC members may require deviations from the UBC Brand Identity Rules and has retained the mechanism under the current Policy for requesting a deviation of such Rules in the amended Policy’s Procedures.

Finally, the proposed amendment updates administrative unit and position titles in the Policy that have changed since the last time it was revised.

BENEFITS Learning, Research, Financial, Sustainability & Reputational	The proposed amendment to the Policy will provide clearer guidance to UBC members on their responsibility to ensure compliance with the UBC Brand Identity Rules and identify the departments and/units responsible for supporting proper adherence to UBC's brand strategy. These amendments to the Policy will support UBC's existing goal of enhancing brand compliance across UBC to maintain, build and reinforce its strong brand recognition and reputation as a leading research, teaching and learning institution.
RISKS Financial, Operational & Reputational	The current Policy does not adequately support compliance with UBC Brand Identity Rules as it does not clearly articulate the roles and responsibility of UBC members with respect to proper adherence to UBC's brand strategy. Without the proposed amendments to the Policy, UBC may have inconsistent branding which erodes UBC's brand recognition.
SCHEDULE Implementation Timeline	Subject to any feedback from the Board of Governors, the next step will be to post the proposed amendment of the Policy on UBC's website and the UBC Bulletin for public comment by the UBC community between April 22, 2019 and June 7, 2019. The Policy Review Committee will then consider any comments received. If necessary, revisions may be made before a final recommendation is then submitted to the Board for approval at its September 24, 2019 meeting.
CONSULTATION Relevant Units, Internal & External Constituencies	The Office of the University Counsel constituted a Policy Review Committee comprised of the following members, to consider and advise on the review of the Policy: <ul style="list-style-type: none"> • Michael Serebriakov, Legal Counsel, Office of the University Counsel (Chair) • Irene Colettis, Paralegal, Office of the University Counsel (Secretary) • Leanne Takenaka, Associate Director, Communications and Marketing – University Relations – UBC Okanagan • Myron Campbell, Instructor, New Media, Faculty of Creative and Critical Studies – UBC Okanagan • Brad Gamble, Assistant Dean, Marketing & Communications, Sauder School of Business • Richard Fisher, Chief Communications Officer, Development and Alumni Engagement • Michael White, Associate Vice President, Campus and Community Planning; alternate: Carole Jolly, Director, Community Development, Campus and Community Planning • Christina Hendricks, Director, Centre for Teaching, Learning and Technology • Rick Hart, Director, Brand and Marketing Communications, External Relations • Katie White, Executive Director, Communications, Faculty of Medicine • Dr. Richard Kurth, Professor & Director, School of Music • John-Paul Heale, Managing Director, Industry Liaisons Office • Graeme Menzies, Director, Prospective Student Marketing, Communications and Social Media

 The University of British Columbia Board of Governors	Policy No.: 94	Approval Date: May 2003 Last Revision: [*]
	Responsible Executive: Vice-President, External Relations	
Title: <p style="text-align: center;">Brand Identity Policy</p>		
Background & Purposes: <p>UBC is a world-class research, teaching, and learning institution committed to maintaining and building on its reputation as a leading university through establishing and communicating a strong and recognizable brand identity that links the UBC faculties, units, and departments that contribute to UBC's excellence. Clear and consistent use of UBC's Brand Identity Elements in all UBC Branded Material enables UBC to maintain, build, and reinforce its strong brand recognition and reputation as a leading research, teaching, and learning institution and prevents third parties from trading improperly upon UBC's reputation or infringing upon UBC Marks.</p> <p>The purpose of this Policy and its related Procedures is to enable UBC Members to appropriately and consistently use and apply UBC's Brand Identity Elements in the course of their official UBC administrative or academic capacities and duties as follows:</p> <ol style="list-style-type: none"> 1. by establishing the appropriate standard of use by UBC Members of UBC's Brand Identity Elements and how such elements are provided on UBC Branded Material; and 2. by clearly identifying the appropriate individuals, faculties, departments, or administrative units responsible for meeting the objectives of this Policy. 		

1. **SCOPE OF THE POLICY**

- 1.1. This Policy applies to UBC Members with respect to the appropriate and consistent use of UBC's Brand Identity Elements and establishes the appropriate standard of use of UBC's Brand Identity Elements by UBC Members in the course of their UBC administrative or academic capacities and duties.
- 1.2. This Policy does not apply to the following circumstances:
 - 1.2.1. a UBC Member seeking to use any of UBC's Brand Identity Elements in a Non-UBC Related Capacity. Any use of UBC's Brand Identity Elements by a UBC Member in a Non-UBC Related Capacity is treated as a third-party use and must be considered under UBC's Policy #110: Third-Party Use of University Trade-Marks; and
 - 1.2.2. any third-party seeking to use any UBC Marks. Any third-party use of UBC Marks must first be authorized under UBC's Policy #110: Third-Party Use of University Trade-Marks.

2. **CONSISTENT USE OF UBC'S BRAND IDENTITY ELEMENTS**

- 2.1. Each UBC Member must, in the course of their UBC administrative or academic capacities and duties:
 - 2.1.1. appropriately and consistently use and apply UBC's Brand Identity Elements to UBC Branded Material; and
 - 2.1.2. accurately identify themselves on all UBC Branded Material to ensure that they are properly reflecting their connection to UBC
- in a manner that is consistent with the UBC Brand Identity Rules.

3. **DEFINITIONS**

- 3.1. In this Policy and its Procedures:
 - 3.1.1. "**Brand Identity Elements**" means, collectively, and includes but is not limited to, UBC's logos, trademarks, official marks, designs, colour schemes, typefaces, graphics, and website and "look and feel" tool kits;

- 3.1.2. “**Non-UBC Related Capacity**” means activities which are not being undertaken in the course of the UBC Member’s official academic or administrative capacity and duties (i.e., undertaken in their personal capacity outside the course of their UBC duties, such as for example a faculty member undertaking their own consulting services);
- 3.1.3. “**UBC Brand Identity Rules**” means the library of resources that establishes the appropriate form and manner of use of UBC’s Brand Identity Elements;
- 3.1.4. “**UBC Branded Material**” means, collectively, and includes but is not limited to, websites, digital and social media, business cards, letterhead and other stationery, merchandise, apparel, advertising or promotional materials, signage, brochures and other publications, and other similar materials prepared by or on behalf of a UBC Member for official UBC purposes;
- 3.1.5. “**UBC Marks**” means UBC’s trademarks and official marks; and
- 3.1.6. “**UBC Member**” means any faculty, unit, department, staff or faculty member of UBC, but does not include a UBC student.

4. **PROCEDURES AFFIXED TO THE POLICY**

- 4.1. The Procedures affixed to and forming a part of this Policy establish the responsibilities and resources available to support proper adherence to and consistent use of UBC’s Brand Identity Elements by UBC Members.

PROCEDURES

[Approved: Month day, year]

Pursuant to Policy #1: Administration of Policies, “Procedures may be amended by the President, provided the new procedures conform to the approved policy. Such amendments are reported at the next meeting of the Board of Governors.” Note: the most recent procedures may be reviewed at <http://universitycounsel.ubc.ca/policies/index/>.

1. SCOPE OF THE PROCEDURES

- 1.1. The Responsible Executive is responsible for establishing UBC’s Brand Identity Elements standards and resources to support the objectives of the Policy and except as otherwise set out in these Procedures, has delegated these duties to the Brand and Marketing department in accordance with these Procedures.

2. ESTABLISHING AND SUPPORTING APPROPRIATE AND CONSISTENT USE OF UBC’S BRAND IDENTITY ELEMENTS

- 2.1. The Brand and Marketing department is responsible for the following Brand Identity Elements related activities:
 - 2.1.1. creating, coordinating, and maintaining the UBC Brand Identity Rules;
 - 2.1.2. publishing the UBC Brand Identity Rules and providing other resources and materials, including computer file formats, on its website to assist and enable UBC Members to appropriately and consistently use and apply UBC’s Brand Identity Elements in accordance with the UBC Brand Identity Rules, available at: brand.ubc.ca; and
 - 2.1.3. acting as a central resource on all matters relating to UBC’s Brand Identity Elements, including consulting with UBC Members wishing to obtain assistance in preparing or reviewing UBC Branded Material for adherence to UBC’s Brand Identity Rules and quality standards.
- 2.2. The University Relations department at UBC’s Okanagan campus is available as a resource to assist UBC Members at UBC’s Okanagan campus on matters relating to

UBC's Brand Identity Elements, including consulting with such UBC Members wishing to obtain assistance in preparing or reviewing UBC Branded Material for adherence to UBC's Brand Identity Rules and quality standards.

3. APPROPRIATE AND CONSISTENT USE OF UBC'S BRAND IDENTITY RULES

- 3.1. Where a UBC Member's UBC Branded Material is not consistent with the UBC Brand Identity Rules, such UBC Member should use its best efforts to update its UBC Branded Material as soon as practicable. Any transition to new, consistent materials will be managed in an orderly and cost-effective manner (i.e., retirement of existing assets and through depletion of existing stockpiles of consumables).
- 3.2. Where a UBC Member wishes to deviate from the UBC Brand Identity Rules, they must consult with the Brand and Marketing department to ensure that the integral elements of UBC's Brand Identity Elements are maintained in any deviation. If the UBC Brand Identity Rules do not address the reasonable requirements of the UBC Member's strategy, then the Brand and Marketing department may allow a deviation or will update the UBC Brand Identity Rules as appropriate. If a disagreement arises and cannot be resolved informally between the head of an academic or administrative unit requesting the deviation and the Senior Director, Brand and Marketing then either party may refer the disagreement to the Responsible Executive, who shall decide the matter.