



SUBJECT	GA7 VISUAL IDENTITY AMENDMENT AND RENAMING OF POLICY
MEETING DATE	SEPTEMBER 24, 2019

Forwarded on the Recommendation of the President

APPROVED FOR SUBMISSION

Santa J. Ono, President and Vice-Chancellor

DECISION REQUESTED	IT IS HEREBY REQUESTED that <i>the Board of Governors approve as circulated proposed amendments and renaming of Policy GA7 Visual Identity.</i>
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Report Date	August 15, 2019
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Presented By Hubert Lai, Q.C., University Counsel
Robin Ciceri, Vice-President External Relations

<i>If this item was previously presented to the Board, please provide a brief description of any major changes since that time.</i>	The draft amendments to Policy GA7 Visual Identity were presented to the Board of Governors for input on April 18, 2019, and then it was published for a call for comment from April 30 to June 14, 2019. The Policy Review Committee reviewed the results of the community consultation and made minor changes to the draft of the proposed amendments to Policy GA7 Visual Identity to more clearly articulate when UBC Members would be required to comply with the brand identity requirements under the Policy, and correcting typographical errors.
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EXECUTIVE SUMMARY

The proposed amendments to Policy GA7 Visual Identity (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 from Visual Identity to Brand Identity 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, as well as the Policy’s format to comply with the new standard form template for Board of Governors policies.

Attachments

1. Proposed version of Policy GA7
2. Blackline of changes to proposed version of Policy GA7 from when the Policy was last submitted to the Board of Governors in April 2019
3. Summary of community consultation and Policy Review Committee recommendations

A copy of the current Policy is available at:

https://universitycounsel2.sites.olt.ubc.ca/files/2019/08/Visual-Identity-Policy_GA7.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 Identity Elements and to accurately identify themselves on all UBC branded material in the course of their official UBC administrative or academic capacities and duties; 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 amendments to the Policy include renaming the Policy from Visual Identity to Brand Identity and updating administrative unit and position titles in the Policy that have changed since the last time it was revised, as well as the Policy's format to comply with the new standard form template for Board of Governors policies.

<p>BENEFITS Learning, Research, Financial, Sustainability & Reputational</p>	<p>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.</p>
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<p>RISKS Financial, Operational & Reputational</p>	<p>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.</p>
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<p>SCHEDULE Implementation Timeline</p>	<p>Subject to any feedback from the Board of Governors, the next step will be to post the approved amended Policy on UBC's website.</p>
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<p>CONSULTATION Relevant Units, Internal & External Constituencies</p>	<p>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:</p> <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
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- 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 proposed revisions to the Policy were published on the Office of the University Counsel website with a call for comments from the UBC community.

The community consultation period was open for seven weeks, from April 30, 2019 to June 14, 2019. During this time, the Committee received two responses. A table setting out the summary of the received comments and the Committee's recommendations in response to the comments are attached as Attachment 3.

The Committee considered the input from the community consultation process and met to discuss the final proposal for the consideration of the Board of Governors. The Committee determined that only minor revisions needed to be made to the Policy since it was last presented to the People, Community & International Committee of the UBC Board of Governors. These revisions include clarifying when UBC members would be required to comply with the brand identity requirements under the Policy by adding the term "official" in front of "UBC administrative or academic capacities and duties" to the following sections of the Policy:

1. Section 2.1 (Scope) which sets out when and how the Policy applies to UBC members;
2. Section 3.1 (Consistent Use of UBC Brand identity Rules) which establishes the requirement for UBC members to comply with UBC Brand Identity Rules; and
3. Section 4.2 (Definitions) which sets out the definition for "Non-UBC Related Capacity" which is used to establish the distinction between a UBC member undertaking activities in their "official UBC administrative or academic capacity and duties" which would trigger compliance with the Policy and those activities undertaken in the UBC member's personal capacity which would fall outside the scope of the Policy.

For further details about the revisions made to the Policy, see Attachment 2, which provides a blackline of changes to the Policy from when the Policy was last submitted to the Board of Governors in April 2019.

 <p>The University of British Columbia Board of Governors</p>	<p>Policy No.: GA7</p>
<p>Long Title: Brand Identity</p>	
<p>Short Title: Brand Identity Policy</p>	

Background & Purposes:

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.

1. General

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:

- 1.1 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
- 1.2 by clearly identifying the appropriate individuals, faculties, departments, or administrative units responsible for meeting the objectives of this Policy.

2. Scope

- 2.1 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 official UBC administrative or academic capacities and duties.
- 2.2 This Policy does not apply to the following circumstances:
 - 2.2.2 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 the Trade-Mark Policy; and

- 2.2.3 any third-party seeking to use any UBC Marks. Any third-party use of UBC Marks must first be authorized under the Trade-Mark Policy.

3. Consistent Use of UBC Brand Identity Rules

- 3.1 Each UBC Member must, in the course of their official UBC administrative or academic capacities and duties:

- 3.1.1 appropriately and consistently use and apply UBC's Brand Identity Elements to UBC Branded Material; and

- 3.1.2 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.

4. Definitions

- 4.1 **"Brand Identity Elements"** means, collectively, and includes but is not limited to, UBC's logos, trademarks, official marks, designs, colour schemes, typefaces, graphics, website "look and feel" and communication tool kits.

- 4.2 **"Non-UBC Related Capacity"** means activities which are not being undertaken in the course of the UBC Member's official UBC administrative or academic capacity and duties (i.e., undertaken in their personal capacity outside the course of their official UBC duties, such as for example a faculty member undertaking their own consulting services).

- 4.3 **"UBC Brand Identity Rules"** means the library of resources that establishes the appropriate form and manner of use of UBC's Brand Identity Elements.

- 4.4 **"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.

- 4.5 **"UBC Marks"** means UBC's trademarks and official marks.

- 4.6 **"UBC Member"** means any faculty, unit, department, staff or faculty member of UBC, but does not include a UBC student.



PROCEDURES ASSOCIATED WITH THE BRAND IDENTITY POLICY

Pursuant to the Regulatory Framework Policy, the President may approve Procedures or the amendment or repeal of Procedures. Such approvals must be reported at the next meeting of the UBC Board of Governors or as soon thereafter as practicable.

Capitalized terms used in these Procedures that are not otherwise defined herein shall have the meanings given to such terms in the accompanying Policy, being the Brand Identity Policy.

1. General

- 1.1 The Procedures affixed to and forming a part of the Brand Identity Policy establish the responsibilities and resources available to support proper adherence to and consistent use of UBC's Brand Identity Elements by UBC Members.
- 1.2 The Responsible Executive (as set out in the attached Explanatory Notes) 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 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 Brand Identity Rules and quality standards.

3. Appropriate and Consistent Use of UBC 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.



EXPLANATORY NOTES REGARDING THE BRAND IDENTITY POLICY AND ASSOCIATED PROCEDURES

Issued September 2019 by the Office of the University Counsel

The OUC has prepared these Explanatory Notes to provide context and background regarding the Brand Identity Policy. These Explanatory Notes do not replace or supersede the content of the Brand Identity Policy and its Procedures.

Policy Long Title:	Brand Identity
Policy Short Title:	Brand identity Policy
Policy Number:	GA7
Responsible Executive:	Vice-President, External Relations
Responsible Board Committee:	People, Community and International Committee
Related Policies:	UP6 - Trade-Mark Policy
History:	<ul style="list-style-type: none">• The Brand Identity Policy was first approved by the Board of Governors in May 2003;• The Brand Identity Policy was updated in July 2019 to reflect a new policy identification system; at the time of this update the Policy was known as the Visual Identity Policy, its long title was Visual Identity, and its number became GA7;• The Brand Identity Policy was revised in September 2019. As part of these revisions the Policy was renamed; it is currently identified as the Brand Identity Policy, its long title is Brand Identity, and its number remains GA7.
Related Legislation:	N/A

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1. General

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- 1.1 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
- 1.2 by clearly identifying the appropriate individuals, faculties, departments, or administrative units responsible for meeting the objectives of this Policy.

2. Scope

- 2.1 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 official UBC administrative or academic capacities and duties.
- 2.2 This Policy does not apply to the following circumstances:
 - 2.2.2 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 the Trade-Mark Policy; and

- 2.2.3 any third-party seeking to use any UBC Marks. Any third-party use of UBC Marks must first be authorized under the Trade-Mark Policy.

3. Consistent Use of UBC's Brand Identity Rules

- 3.1 Each UBC Member must, in the course of their official UBC administrative or academic capacities and duties:
- 3.1.1 appropriately and consistently use and apply UBC's Brand Identity Elements to UBC Branded Material; and
- 3.1.2 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.

4. Definitions

- 4.1 **"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" and communication tool kits.
- 4.2 **"Non-UBC Related Capacity"** means activities which are not being undertaken in the course of the UBC Member's ~~official UBC academic or~~ administrative ~~or academic~~ capacity and duties (i.e., undertaken in their personal capacity outside the course of their official UBC duties, such as for example a faculty member undertaking their own consulting services).
- 4.3 **"UBC Brand Identity Rules"** means the library of resources that establishes the appropriate form and manner of use of UBC's Brand Identity Elements.
- 4.4 **"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.
- 4.5 **"UBC Marks"** means UBC's trademarks and official marks.
- 4.6 **"UBC Member"** means any faculty, unit, department, staff or faculty member of UBC, but does not include a UBC student.



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1. General

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- 1.2 The Responsible Executive (as set out in the attached Explanatory Notes) 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.



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Related Legislation:	N/A

Proposed Revisions to Policy #94 – Community Consultation Summary

No.	Comment	Themes	Source	Campus	Committee Recommendation
1.	<p>Does this policy apply to websites made by faculty, and if so, does this mean that such material must bear a UBC brand? If that's the case, the requirement is onerous.</p> <p>It is not clear what resources are available to support faculty and to show what branding must look like.</p> <p>If websites were moved from "their current UBC home", would there be an obligation to display branding?</p>	<p>Onerous Lack of clarity</p>	Faculty	Vancouver	<p>The Committee recommended adding the term "official" in front of "UBC administrative or academic capacities and duties" where used throughout the Policy to more clearly articulate when UBC members would be required to comply with the brand identity requirements under the Policy, including websites. The Committee felt that the resources available are clearly set out in the Procedures which identify the Brand Identity Rules and the relevant departments on both campuses that UBC Members can contact for assistance.</p>
2.	<p>The name "Brand Identity Rules" is inconsistent with the "Brand Identity Guidelines" currently appearing on the webpage.</p> <p>There is nothing indicating an update schedule or ways for departments to stay informed of what the branding rules actually are. Frequent updates, if they are required, would be financial onerous</p>	<p>Onerous Lack of clarity</p>	Faculty	Vancouver	<p>The Brand Identity Guidelines will be renamed to Brand Identity Rules and will be treated as such.</p> <p>The Brand Identity Rules will be published on the Brand and Marketing website. At this time, the department does not have a mechanism for notifying UBC Members about brand identity updates.</p> <p>The Committee felt that section 3 of the Procedures sets out the manner in which UBC Members should update their UBC Branded Materials and indicates that UBC Members should "use their best efforts to update its UBC Branded Material as soon as practicable" and "in an orderly and cost-effective manner..." and thus already addresses the financial costs of updating to new brand resources.</p>