

# Visual Identity Procedures

Supporting the Visual Identity Policy

Authority: President / Vice-President, Administration and Finance

Operational Authority: Director, Marketing and Production

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## 1. Purpose

These Procedures operationalize the *Visual Identity Policy* and the Visual Identity and Graphic Standards Guidelines. They establish **mandatory** controls, workflows, and approval requirements governing the creation, use, production, and distribution of University-branded materials.

These Procedures ensure:

- Consistent application of visual identity standards
- Protection of University trademarks
- Centralized control of brand assets
- Enforceable approval and payment controls
- Clear authority for the Marketing and Production unit

These Procedures are binding on all University members and external partners.

## 2. Governing Authority and Decision Rights

Under the *Visual Identity Policy*:

- Marketing and Production is the final approval authority on visual identity application.
- No branded material may be published, printed, launched, or distributed without approval where required under these Procedures.
- Marketing and Production decisions on brand compliance are determinative, not advisory.

Marketing and Production has final approval authority over:

- Visual identity application
- Logo and identifier use
- Co-branding
- Sub-brand visuals
- Campaign identity systems

- Merchandise graphics
- Vendor-produced branded materials

Approval decisions are binding.

Where disputes arise, the escalation path is:

Marketing and Production to Vice-President, Administration and Finance to President (final).

## 3. Official Brand Asset Source

### 3.1 Authorized Platforms

Brandfolder and the [Marketing and Production SharePoint site](#) are the University's official and exclusive distribution platforms for approved brand assets. Access is limited to current faculty and staff only.

All University members and external partners (when necessary) must obtain brand assets only from:

- Brandfolder
- Marketing and Production SharePoint site
- Marketing and Production directly

### 3.2 Required Asset Use

Only approved versions of the following may be used:

- Logos
- Identifiers
- Wordmarks
- Templates
- Lockups
- Graphic assets
- Brand system files

### 3.3 Prohibited Sources

Use of logos or brand assets from the following is prohibited:

- Search engine (e.g. Google) image search
- Old and archived files
- Past projects
- Screenshots
- Websites, including upei.ca and any other
- Other departments
- Vendor archives

Only current official assets are considered valid.

## 4. Materials Requiring Mandatory Pre-Approval

The following materials must be reviewed and approved by Marketing and Production before release, production, purchase, or launch:

### 4.1 Print and Digital Materials

- Advertising (print or digital)
- Campaign materials
- Recruitment materials
- Brochures, reports, posters, bookmarks, stickers, and “take-away” collateral
- External presentations
- Publications and PDFs
- Identity packages and stationery

### 4.2 Digital Assets

- New websites
- Major website redesigns
- Microsites and campaign pages
- Social media identity graphics
- Digital signage
- Motion graphics and video branding

### 4.3 Identity and Visual Systems

- Logos
- Identifiers
- Sub-brands

- Event visual systems
- Co-brand lockups

#### 4.4 Merchandise and Apparel

- Clothing
- Promotional items
- Giveaways
- Retail merchandise

(UPEI Bookstore approval is also required.)

#### 4.5 Environmental and Physical Branding

- Signage
- Vehicle graphics
- Displays and booths
- Donor recognition signage

No exceptions based on budget size, timeline urgency, or funding source.

## 5. Brand Architecture Enforcement

Brand architecture categories defined in the *Visual Identity and Graphic Standards Guidelines* document govern identifier eligibility:

- Core units: UPEI logo and identifiers
- Differentiated/aligned: approved secondary marks only
- Independent entities: restricted use
- Student groups: text-only or approved limited use

Units may not self-classify. Marketing and Production determines classification.

## 6. Prohibition on Independent Brand Asset Creation

No University member or external partner may independently create:

- Logos
- Identifiers
- Sub-brands
- Campaign identity systems
- Branded templates
- Promotional visual systems

All branded asset creation requires Marketing and Production approval prior to use.

Unauthorized asset creation constitutes a policy violation.

## 7. Digital, Web, and Accessibility Compliance

All digital branded materials must comply with:

- *Visual Identity and Graphic Standards Guidelines*
- WCAG 2.2 accessibility standards
- Approved typography, color, and layout rules

Applies to:

- Websites
- PDFs
- Forms
- Social graphics
- Digital signage
- Multimedia content

Marketing and Production approval includes accessibility and brand compliance review. Non-compliant materials may be revised or removed.

## 8. Sustainable Production Requirements

Units producing branded materials must:

- Prefer digital distribution where feasible

- Minimize unnecessary print production
- Follow approved sustainable print specifications
- Use environmentally responsible production methods where available

Marketing and Production may require sustainable alternatives.

## 9. Vendor and External Designer Controls

Units may not hire external designers or agencies for branded work unless:

- Marketing and Production is notified and approves
- Brand standards briefing is provided
- Final output is approved

Marketing and Production may:

- Require revisions
- Reject non-compliant work
- Remove vendor eligibility for repeat violations

## 10. Procurement and Payment Controls

Per the Visual Identity and Graphic Standards Guidelines authority Procurement must:

- Flag branded purchases
- Require approval confirmation
- Hold POs without approval

Financial Services must:

- Refuse payment without Marketing and Production or UPEI Bookstore approval
- Return non-compliant invoices

No approval means no payment.

## 11. Central Printing Controls

Central Printing must:



- Refuse print jobs lacking approval
- Reject retired or altered logo
- Verify brand compliance
- Route questionable materials and violations to Marketing and Production

## 12. UPEI Bookstore Merchandise Controls

The UPEI Bookstore authority includes:

- Trademark enforcement
- Merchandise approval
- Vendor control
- Royalty protection
- Annual trademark notices

The UPEI Bookstore is an ancillary operation of the University and must receive first opportunity to supply members of UPEI with specialty UPEI-trademarked merchandise or items. Non-approved merchandise may be discontinued at unit cost.

## 13. Athletics and Recreation Branding Controls

Athletics and Recreation must obtain Marketing and Production approval for:

- Uniform branding
- Team merchandise
- Promotional graphics
- Facility branding
- Event visuals

Logos and identifiers may not be altered.

Non-compliant athletics branding may be withdrawn or corrected at unit expense.

## 14. Third-Party and Co-Brand Rules

Third-party logos:

- Must be reviewed

- Must not dominate UPEI identity
- Must follow placement standards
- Must have permission documentation
- Must use approved lockups

Marketing and Production decides placement and hierarchy.

## 15. Campaign Launch Authority

No campaign may launch publicly without:

- Brand approval
- Visual approval
- Identifier approval
- Co-brand approval (if applicable)

Marketing and Production may halt campaign launch if standards are not met.

## 16. Violations and Correction Procedures

When non-compliance is identified:

- Step 1: Written notice
- Step 2: Distribution halt
- Step 3: Required corrections
- Step 4: Withdrawal or replacement order

Materials may be removed, revised, or reprinted.

Costs may be assigned to the originating unit.

## 17. Financial Consequences for Non-Compliance

Units may be required to cover:

- Reprint costs
- Redesign costs

- Replacement merchandise costs
- Vendor correction costs

Funding may be withheld or redirected.

## 18. Repeat Violations

Marketing and Production may suspend:

- Brandfolder access
- Template access
- Design platform access
- Logo download rights

Reinstatement requires:

- Training
- Supervisor acknowledgment
- Compliance commitment

## 19. Exception Requests Procedure

Exception requests must include:

- Business rationale
- Audience justification
- Duration of exception
- Risk assessment

Marketing and Production may approve, deny, or conditionally approve on a case-by-case basis.

Exceptions are documented and time-limited.

## 20. Emerging Technology and AI Controls

AI-generated or automated brand outputs:

- Must follow *Visual Identity and Graphic Standards Guidelines*
- Must be reviewed

- May not generate logos or identifiers
- May not alter trademarks

Marketing and Production will issue updated guidance as tools evolve.

## 21. Training and Compliance Support

Marketing and Production will provide:

- Brand training sessions when requested
- Template libraries
- Accessibility guidance

Support availability does not remove compliance obligations.