

<b><u>University of Prince Edward Island</u></b>	<b><u>Policy No.</u></b> govbrdgnl0015	<b><u>Revision No.</u></b> 0
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<b><u>Creation Date:</u></b> December 1, 2011	<b><u>Version Date:</u></b> December 1, 2011	<b><u>Review Date:</u></b> December 1, 2014
<b><u>Authority:</u></b> The Board of Governors & SMG	<b><u>Responsibility:</u></b> Vice-President, Administration & Finance and Director, Integrated Communications	<b><u>WWW Access:</u></b> Yes

## Introduction/Overview

In support of overall institutional brand, UPEI is committed to ensuring the accurate and consistent presentation and inclusion of its visual identity on all materials (print, electronic, on-line, signage, merchandise, etc.) produced by, for, or in conjunction with any area of the University that is housed at, or funded by, or whose funds are administered by, the University.

The University recognizes that the transition to consistent visual identity is a process that has been taking place on campus over a number of years in a gradual and cost-effective manner—beginning with the 2008 *Draft Report of the University of Prince Edward Island Task Force on Visual Identity*.

During the process, consumable goods displaying out-of-date identity have been updated upon re-order; other more permanent instances (e.g. signage installations) have been retired and/or replaced. With the bulk of materials now renewed, the University requires compliance with the *Visual Identity Policy*.

### 1. Purpose

The purpose of this policy is to:

- 1.1 establish the rules and authority, and reference the procedures and guidelines for the required use, protection, consistent application, and proper presentation of institutional visual identity (brand symbols, trademarks and associated graphic elements) in all visual representations in any capacity or location—physical, electronic, or on-line—of the University of Prince Edward Island, or any of its component parts.
- 1.2 enhance the recognition and reputation of the University.
- 1.3 prevent dilution of, or damage to, the institutional brand through inappropriate or irregular use of visual identity.
- 1.4 provide a mechanism for the use of the University's visual identity

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## 2. Scope

- 2.1 The policy applies to all members of the University community.
- 2.2 This policy applies to all instances of visual identity application representing or related to the University of Prince Edward Island and/or its community. The policy applies, but is not limited to the following:
  - 2.2.1 University print advertising, external presentation materials or visuals, and promotional information .
  - 2.2.2 University corporate identity packages (letterhead, business cards, envelopes, and other stationary).
  - 2.2.3 University websites (including those on \*.upei.ca and all other sites on or off UPEI servers) that represent areas housed or funded by, or have funds administered by UPEI, UPEI web presences and other web services (free or purchased), television advertising, and all other forms of electronic communication or promotion .
  - 2.2.4 University signage and way finding.
  - 2.2.5 University donor recognition signage.
  - 2.2.6 University vehicle livery.
  - 2.2.7 University uniforms (e.g. varsity).

## 3. Definitions

- 3.1 In this policy the following definitions apply:
- 3.2 The University's "**Visual Identity**" refers to the means by which the University is recognized visually, and is projected on campus and externally through the consistent design and application of visuals, distinguishing it from other institutions. The elements of the University's visual identity include, but are not limited to: the University name, initials, logos, trademarks, element positioning, typefaces, and official colours, and their defined relationship to each other, within, for example, letterhead, brochures, advertising, websites, way finding, and vehicle livery. A managed visual identity supports the University's brand cohesion, differentiation, and reputation through the consistent attribution and association of achievements and values to the institution.

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- 3.3 “*Visual Identity and Graphic Standards Guidelines*” refers to the “*Guidelines*” manual endorsed by the UPEI Board Development, Fundraising, and External Relations Committee on June 9, 2011, and approved by the Board of Governors on December 1, 2011, that clearly defines, through description and graphic examples, the rules governing implementation of UPEI’s visual identity across all sectors of the University.
- 3.4 “**UPEI**” or “**the University**”, when used herein, means the University of Prince Edward Island.
- 3.5 “**The University Community**”, when used herein, includes, but is not limited to the following: faculties, departments, units, institutes, centres, projects (including multi-institutional projects led from UPEI), groups, boards, associations, committees, faculty, staff, students, external partners, contractors, suppliers and agents representing in any capacity the University of Prince Edward Island.
- 3.6 When used herein the following terms, namely, “**Vice-President, Administration & Finance; Comptroller; Manager, Bookstore; Director, Financial Services; Manager, Procurement Services; Staff, Central Printing; Director, Integrated Communications (IC), and IC Art Director**” refer to the employee holding the specified employment positions staffed by the University at that particular time.
- 3.7 “**Senior Management Group**” (SMG) refers to the committee of senior managers chaired by the President, and normally consisting of the President, Vice-Presidents, Deans, the University Librarian, and Directors.
- 3.8 “**Materials**” refers to the distribution vehicle that displays or should display UPEI’s visual identity, e.g. print, television, web, signage, merchandise, etc.
- 3.9 “**Brand**” refers to UPEI’s unique and emotive value proposition—our promise to deliver excellence in teaching, research, and service—rooted in history, reflective of place, demonstrating substantive achievement, respectful of relationships at home and around the world.
- 3.10 “**Wordmark**” refers to the standardized graphic representation of the combined name and initials of the University, used for purposes of visual identification.

#### 4. Responsibilities

- 4.1 Responsibility for the approval of this policy rests with the Board of Governors.

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- 4.2 Responsibility for implementation and enforcement of this policy rests with the President and the Vice-President, Administration & Finance through the offices of the Director, Integrated Communications; the Comptroller; the Manager, Bookstore; the Director, Financial Services; the Manager, Accounting; and the Manager, Procurement.
- 4.3 The Director of Integrated Communications, or designate IC Art Director, is responsible for ensuring the development and maintenance of a visual identity guidelines document defining the appropriate use of all visuals (wordmark, shield logo, coat of arms, logos, typefaces, signatures) that constitutes and supports the University’s visual identity.
- 4.4 The Director of Integrated Communications is responsible for ensuring the publication and promotion of the *Visual Identity and Graphic Standards Guidelines* document as approved by the Board, and ensuring its availability on-line, or in print format for the cost of production.
- 4.5 The Director of Integrated Communications, or designate IC Art Director, is responsible for ensuring the creation, integrity, and maintenance of artwork representing—in all approved configurations—the key trademarked and associated elements of visual identity (wordmark, coat of arms, shield, flag, logos) that are consistent with the *Visual Identity and Graphic Standards Guidelines*.
- 4.6 The Director of Integrated Communications, or designate IC Art Director, is responsible for ensuring the creation and maintenance of resources related to visual identity, and their availability on-line to assist the University community in appropriately applying visual identity.
- 4.7 The Director of Integrated Communications, or designate IC Art Director, is responsible for ensuring the professional design, production, and consistency of promotional artwork and materials that advance the mission and reputational goals of the University, while appropriately representing the visual identity of the University to its diverse external audiences.
- 4.8 The Director of Integrated Communications is responsible for ensuring that assistance is available to members of the University community, whose existing materials are incompatible with visual identity guidelines, as they achieve alignment and compliance through revised artwork and materials.
- 4.9 The Director of Integrated Communications is responsible for ensuring that IC acts as a service to members of the University community requiring design or production support on matters or materials (print or electronic) related to, or presenting, visual identity. In the event that Integrated Communications is

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unable, due to prior commitments or unavailable skill sets, to provide services required in a timely manner (including print, web, or multi-media design or production); and if outsourcing is then necessary, the Director of IC, or designate IC Art Director, shall assist the process and the client by reviewing visual identity guidelines with service providers at project startup, thereby ensuring supplier awareness and compliance with Visual Identity Policy.

- 4.10 The Vice-President, Administration & Finance is responsible for ensuring—and delegating authority to any department tasked with providing purchase orders or processing payment for goods or services that should, or do, display visual identity—that such goods or services have been created, approved, or signed off by the Director, Integrated Communications, the IC Art Director, and/or the Manager, UPEI Bookstore.
- 4.11 The Manager, UPEI Bookstore is responsible for ensuring and approving the accurate depiction of trademarked elements of visual identity on merchandise, and for collecting royalties on merchandise displaying trademarks of the University of Prince Edward Island.
- 4.12 The Manager, UPEI Bookstore is responsible for publishing a notice (yearly) informing both internal and external audiences that UPEI protects its trademarks, and follows and enforces specific rules governing their use.
- 4.13 Staff of Central Printing are responsible for assisting clients to align with the *Visual Identity Graphic Standards and Guidelines* by ensuring that requests to print non-compliant documents (e.g. those presenting with retired logos, unacceptable executions of current visual identity, and documents intended for external audiences) are referred back to their originators, with the direction that they seek sign off or production assistance from Integrated Communications.

## 5. Policy

- 5.1 All visual materials (see Scope) representing the University of Prince Edward Island, or any of its component parts must include the University’s approved visual identity and structure in compliance with the *Visual Identity and Graphic Standards Guidelines*.
- 5.2 The University of Prince Edward Island recognizes that it is, and must be, represented by distinct and approved symbols and elements—identifiers that have been copyrighted and trademarked—that through consistent depiction and prominence make up institutional visual identity. The University recognizes that appropriate use of visual identity is a critical component of overall brand. Consistent visual identity enhances recognition and reputation, demonstrates

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common organizational goals of diverse stakeholders, and reduces inefficiencies and expenses in both the design and production of materials.

- 5.3 Centres, units, institutes, groups and all other members of the University community delivering information via websites on UPEI servers, or via websites hosted on off-campus servers, or via other web services (free or purchased), must ensure that their sites comply with the *Visual Identity Policy*, and follow guidelines as outlined in the *Visual Identity and Graphic Standards Guidelines* document.
- 5.4 Centres, units, institutes, groups, projects and all other members of the University community currently deviating from this policy and its supporting guidelines as outlined in the *Visual Identity and Graphic Standards Guidelines* document shall now comply.
- 5.5 A transition period ending December 31, 2012, is available to allow entities (e.g. unofficial centres) that are not aligned with this policy, to comply. Those seeking this transition period must notify the Vice-President, Administration & Finance.
- 5.6 Integrated Communications is available to assist those units of the UPEI community who require design or production support to meet the compliance requirements of this policy.

## **6. Violations of this Policy**

- 6.1 Those generating and/or distributing print or fabricated items, including merchandise, in violation of this policy will be requested to remove the items from circulation.
- 6.2 All areas requesting purchase orders from Procurement for items (including advertising, promotional materials, merchandise, etc.) and services (including design and web production) that do not comply with this Policy and the procedures in the *Visual Identity Graphic Standards and Guidelines*, will be refused. Areas requesting purchase orders from Procurement for similar non-compliant products or services that have already been generated or completed, will be refused. Areas presenting invoices for similar non-compliant products or services directly to Accounting Payables for processing without purchase orders, will also be refused.
- 6.3 Individuals responsible for the content of websites and other electronic visuals hosted on- or off-campus found in violation of this policy will be directed to comply with this Policy. This direction will be made in writing to the individual responsible for the website/electronic visual(s), by the Vice-President, Administration and Finance.

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6.4 External suppliers or producers who receive a request to include UPEI trademarks in materials destined for production, and who are aware of UPEI's published purchasing and sign off requirements related to trademark and visual identity, will refuse to proceed with the job in the absence of proper process, and will refer the client, or the job, back to the client or to the appropriate department of the University.

6.5 Failure to acknowledge the University appropriately, as per the *Visual Identity Graphic Standards and Guidelines*, on any print or electronic information, or promotional product, or any other material that should display the University's visual identity, is considered a violation of this Policy.

## **7. Review**

7.1 This policy will be reviewed every three years.

## **8. Appendix**

Procedures: *Visual Identity and Graphics Standards Guidelines*

[upei.ca/visualidentityguidelines](http://upei.ca/visualidentityguidelines)