

## PROCEDURES HANDBOOK

In accordance with the *Policy on the Use of Concordia University's Name, and the Governance of its Visual Character and Digital Presence* ([SG-4](#))

Last updated: December 2024

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**This Procedures Handbook** is related to and does not replace or supersede the contents of the *Policy on the Use of Concordia University's Name, and the Governance of its Visual Character and Digital Presence* ([SG-4](#)) (the "Policy"), and reflects the current practices regarding the use of The University's Name, and the governance of its visual character and digital presence. Unless otherwise defined herein, all capitalized terms shall have the meaning ascribed to them in the Policy.

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### 1. Logo use by University Departments

University departments requiring and/or producing printed Public Materials, must follow one of these options:

- Submit their requirements and specifications to University Communications Services ("UCS") for the internal production of the material;
- Create their own material, which must be submitted to UCS for verification and approval; or
- Arrange for the production of the material by an external company. The company must be selected from a list of approved contractors provided by UCS. The material shall be verified and approved by UCS. A department that chooses this option is responsible for any related fees.

Please contact the [UCS Studio Manager](#) to request the University's official logo and any official photography.

### 2. Use by Clubs, Groups, Organizations or Associations

The decision to grant, decline or withdraw permission to use the University's Name, shall be assessed based on the following guidelines:

- The nature of the Group - a group should be of the sort that one would associate with a University community. For example, a not-for-profit group is generally preferable to a for-profit group;
- The membership of the Group – a Group in which membership is restricted to University students, faculty, staff or alumni is preferable. The membership should be large enough to warrant using the University's Name, and to ensure certain stability to the Group;
- The goals and objectives of the Group - the objectives and proposed activities of the Group should contribute to the educational, social or cultural values of the University;
- The organizational structure of the Group - the Charter, by-laws, procedures or rules of conduct of the Group should be presented. Such documents should enable all members joining the Group to be fully aware of their rights and responsibilities;
- The resources of the Group - the human, financial and material resources available to the Group should be demonstrably adequate for the Group to fulfill its mission

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and objectives;

- The history of the Group - a Group that has a proven track record for integrity and success is preferable;
- The internal and external support for the Group: A Group that has received support from other recognized internal and external groups in their application for permission is preferable;
- The quality of the application itself: a Group that submits a well-organized, well-documented and well-argued application is preferable.

### 3. Use of University's Name

In accordance with the principles outlined in *the Policy on the Use of Concordia University's Name, and the Governance of its Visual Character and Digital Presence* ([SG-4](#)), the request for the use of the University's Name may be declined or withdrawn, where the requesting party or user of the University Name engages in any activities that may:

- result in discrimination, harassment, including sexual harassment;
- be threatening or violent or pose a threat to property as defined in the *Code of Rights and Responsibilities* ([BD-3](#));
- constitute a form of discrimination prohibited under the *Quebec Charter of Human Rights and Freedoms, CQLR, chapter C-12*;
- be contrary to applicable legislation or University policies;
- adversely affect the reputation of the University; and
- be inconsistent with the values, reputation, and the orientation (present or future) of the University.

The prohibitions hereinabove are to be read and interpreted in the most expansive terms to ensure compliance with the University's values, ethos, orientation (present or future) and ensure the protection of its reputation.

### 4. Use of Additional Logos and/or Graphic Elements on concordia.ca

Any web presence created under the concordia.ca domain is not permitted to have its own unique logo and/or graphic element displayed their page(s).

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Exceptions include: Research centres and/or labs whereby funding agreements stipulate that a graphic element must be present on any or all web presences. Legacy centres and units that already have an approved element being used on their web pages.

### 5. Licensing Program

All applications for the use of the University's Name, for commercial purposes and/or exceptional custom design shall be made, in the first instance, for conditional approval of the application, to the [UCS Studio Manager](#).

Upon conditional approval of the application, the potential licensee shall submit designs incorporating the University's Name, as well as product samples for initial approval by UCS and final approval by the Secretary-General, in accordance with *the Policy on the Use of Concordia University's Name, and the Governance of its Visual Character and Digital Presence* ([SG-4](#)).

Following the grant of a request, a non-exclusive, revocable licensing agreement shall be entered into with the licensee. The licensing agreement shall apply for a specific term and shall, in cases where it is for commercial use, provide for a royalty fee to be paid to the University based on the wholesale price of the product. All royalty fees shall be credited to various scholarships and awards.

In the event of an application for the use of the University Name, in conjunction with fund-raising or charitable events, the Secretary-General may decide that royalty fees shall not be charged.

The University Bookstore, the Office of Advancement and Alumni Relations and the Department of Recreation and Athletics are excluded from the mandatory licensing program.

### 6. Websites

#### *a) Web publication protocols*

There are four "tiers" of web content publication protocols at Concordia University.

1. Web content that represents a core functionality and/or service of the University.
  - a. i.e., a faculty, department, unit, program, service, research centre, etc.
2. Web content created in partnership with the University

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- a. i.e., partnered programs, research grants, research networks, initiatives, etc.
3. Web content that supports a more individual endeavour for a faculty member in the university
  - a. i.e., personal website for a faculty member, or a website to support a specific course.
4. Web content that supports a research lab and/or group owned by a faculty member(s)

Tier 1: This is the responsibility of the Web Communications team. All content *must* be published in the University's chosen Web Content Management System (WCMS) Adobe Experience Manager (AEM).

Tier 2: This is the responsibility of the Web Communications team. Whether or not the website should live on the WCMS is at the discretion of the Web Communications team; each request will be evaluated on a case-by-case basis. In cases where an exception has been granted (see section 5d) and the website can live externally to Concordia.ca, the required web presence on our WCMS gets reduced to a single web page that summarizes the external web presence.

Tiers 3 and 4: UCS is not involved in the creation of websites that fall into these tiers. Any existing websites that fall into these categories that currently live on our WCMS will be legaced, however further substantial overhauls/revamps will not be undertaken.

### ***b) Websites not housed on Concordia.ca***

Websites from the following units are not housed on Concordia.ca:

- University-affiliated daycare centres
- Student groups, associations, and clubs
- Unions and other similar associations

### ***c) Legacy websites and servers***

Websites housed on University affiliated secondary servers prior to January 1, 2015, will continue to be accommodated to the extent that it is possible to do so within the parameters established by IITS for the ease, security and maintenance of secondary servers.

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A unit that forms a part of the above list of exceptions planning to launch a website after January 1, 2015, and have it housed on Concordia.ca, will have to work within the parameters established by IITS for the use, security and maintenance of secondary servers. The request will also be reviewed by UCS as should the new website fall into the categorization of a tier 1 or tier 2 web presence (section 5a), it will be required that the new website be built on the University's WCMS.

### *d) Requests to be exempt from use of the WCMS and/or Concordia.ca domain name*

Websites from the following units may apply to be exempt from Concordia's Web Content Management System (WCMS) and be housed on a non-Concordia server and not have a Concordia.ca domain name:

- A research centre consortium that involves external partners
- Research centres/units for which the visual component of the site is considered integral to the research/creation itself

To apply for an exemption, a unit must submit a written request to [UCS Web Communications](#).

If the request is granted, the unit must:

- Work with University Communications Services (UCS) to create a landing page within the concordia.ca website
- Have the external website conform to Concordia's overall look and feel
  - The website design must be approved by UCS
  - The domain name must be approved by UCS
  - The website must contain the Concordia logo in a prominent location

### *e) Request for migration to Concordia's WCMS*

To request moving a website that was previously hosted on a secondary Concordia server, or an external server, to the WCMS, the following information must be provided in writing to [UCS Web Communications](#):

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- A justification from the Dean or VP, Research and Graduate Studies or AVP Research shall be used to evaluate the merit of the project. This justification should also answer the following questions:
  - Who is responsible for managing the website?
  - Who is the website's target audience? (e.g., current students, prospective students, current faculty, prospective faculty).
  - Is the current website running on a third-party application?

**Evaluation:** UCS and/or the UCS /IITS Liaison committee will review the written request and contact the unit in question to discuss how to best move the site to Concordia's WCMS.

**Timeline:** If granted, a prospective timeline for migrating a unit's website will be established pursuant to discussions with UCS.

### *f) Subdomains*

When Concordia launched its unified web presence using the Adobe Experience Manager Web Content Management System, the University moved from having web presences live in a subdomain environment to a sub-folder environment. As per clause 5c, there are several legacy informational websites still in existence, however no new web presences may be created on a subdomain of Concordia.ca. Exceptions to this rule are made on a case-by-case basis for Web-based institutional applications (see Section 6) that support a core University function and/or initiative, and for shared initiatives with partner organizations. Requests to have a subdomain request approved must be sent to [UCS Web Communications](#) or via the current IITS ticketing system).

### *g) Requests for major changes to Concordia.ca and Carrefour*

There may be requests for major changes to the Concordia.ca public website and/or the intranet (Carrefour), such as the revamping of the information architecture (navigation/page structure), visual redesigns, or the development of new features and functionality.

Any major changes should always be discussed with the unit's [Communications Advisor](#), who will be responsible for creating any official requests. Units without a Communications Advisor are invited to contact [webcoord@concordia.ca](mailto:webcoord@concordia.ca)



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**Evaluation:** UCS Web Communications will review the request and contact the communications advisor and/or the unit in question.

**Timeline:** If the request is accepted, a prospective timeline will be established pursuant to discussions with UCS.

### *h) Website Access and Maintenance*

Certain members of the Concordia community may request access to specific sections/pages within the Concordia.ca website; supervisors must make the request for their employee(s) once they confirm that they meet the required [eligibility guidelines](#). Once a user has been trained and given access to their unit's webpages, UCS's role (with regards to that specific unit's pages) changes from being an updater, to one of support for the trained user. Unless large changes to content and/or pages need to be undertaken\*, the trained user is expected to update and maintain their unit's web presence.

*\*examples of large changes include changes in navigation, landing page layout, visual design changes, creation/deletion of multiple pages, page moves and creation of folders.*

## 7. Web-based Institutional Applications

Academic and administrative units may house web-based institutional applications outside of the WCMS—either using the Concordia.ca domain name or an alternative domain name should the WCMS not meet the needs of the unit in question. In order for an application to be considered, it must support a core University function and/or initiative.

Examples of such applications are:

- the University's student information system (SIS)
- HR & Finance systems (Unity)
- Student CRM
- Selligent
- Moodle
- Concordia Curriculum Management System (CCMS)
- Embrace the City



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All institutional applications must have their UI/design approved by UCS *prior to launch* to ensure the overall UX harmonization and seamless branding of Concordia's institutional applications.

### 8. Concordia's Mobile Application (The Concordia App)

#### *a) Requests to add content to the Concordia App*

**Request process:** Individuals who would like to submit a request to develop content to be placed on the Concordia app should discuss their request with their unit's [Communication Advisor](#). Unit's without a communications advisor should write directly to [UCS Web Communications](#)

**Evaluation:** Representatives from both UCS and IITS will meet to evaluate and approve such requests. Please note that, in order to develop a better understanding of the associated requirements and to be best poised to evaluate a request, UCS and IITS may request that a proposal and a presentation be delivered about the suggested addition(s) to the app.

**Timeline:** A prospective timeline will be established pursuant to discussions with UCS and IITS representatives.

### 9. Institutional Social Media Accounts

#### *a) Creating an institutional social media account*

If an academic or administrative unit wishes to create and manage a Concordia social media account, that unit should contact its Communications Advisor or the [UCS Social Media team](#) who will review the written request and contact the unit in question to discuss optimal solutions. Once the social media account is approved, a Concordia branded avatar will be created by the UCS Studio team.

Creating an account without in-depth knowledge of social media best practices or an awareness of the time, resource and content requirements is not advisable, especially considering content may be able to be promoted on existing accounts that already boast a large follower base. For example:

- Concordia Facebook: 132,000+ followers

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- Concordia X: 80,000+ followers
- Concordia Instagram: 53,000+ followers
- Concordia LinkedIn page: 315,000+ followers
- Concordia YouTube: 19,700+ channel subscribers

Managing a social media account is labour intensive and requires a plan that includes answers to the following questions:

### *Goals*

- What are the goals of the proposed social media account(s)?
- Who are the audiences you are trying to reach? Are they on social media? If so, which platforms?
- What content will you be sharing on these platforms? Is the nature of the content a good fit with content typically posted on the target platforms?
- Does the content appeal to the targeted demographic?
- How would this presence work with other communication channels used by the University (website, other social media services)?
- Does a similar social media presence already exist? If so, would working with this presence make better sense for the targeted audience?

### *Level of engagement*

- What time commitment is required to run the proposed account(s)?
- Are the required resources available?
- How will the community be engaged and what are the implications of its participation?
- How often will content need to be produced to keep the channel(s) refreshed and relevant?
- How can the Concordia brand be protected? Is additional moderation necessary?
- For how long will the proposed presence exist?

### *Strategic considerations*

- How will success be measured in qualitative and quantitative terms?
- What is the proposed exit strategy?
- Is the overall time investment and cost worth the benefit the social media channel(s) /presence will deliver?

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**Request submission process:** A unit may contact the Communications Advisor responsible for that unit who will work with it and the UCS social media team to help the unit:

- Map out its needs - set up a meeting with a member of the social media team to discuss best options to meet the unit's goals;
- Help identify and recommend an appropriate name/handle and hashtag;
- Help set up the account(s);
- Provide graphic materials for the accounts (ie Avatar, suggestions for cover images)
- Provide branding guidelines for things like bios, about sections, etc. ensuring that the unit is following University branding guidelines and policies;
- Provide overall guidelines and help with social media standards, including tagging, replying, the use of hashtags, link shorteners, etc.;
- Make suggestions as to how to promote the unit's content and events in conjunction with the social media team, via the weekly social media line-up, in addition to possibly collaborating with other units at the University with a presence on social media;
- Offer suggestions on how to engage with a unit's audiences on social media and how to respond to negative comments.

Units who do not have a Communications Advisor are invited to contact [socialmedia@concordia.ca](mailto:socialmedia@concordia.ca).

### *b) Social media promotion request*

A unit interested in requesting the promotion of an initiative or event or running a social media promotional campaign should contact their Communications Advisor or the [UCS social media team](#) for assistance *at least four weeks before the event or deadline or initiative itself*, to allow enough time to identify the goals for the campaign, appropriate platforms, content, appropriate hashtags, partners (if applicable), timing/rollout schedule and other aspects related to the plan for the campaign itself.