

## PROCEDURES HANDBOOK

*As per Policy on the Use of Concordia University's Name, Logo, and Related Insignia, and the Governance of its Visual Character and Digital Presence (SG-4)*

Last Updated - May 2020

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**This Procedure Handbook** is related to the *Policy on the Use of Concordia University's Name, Logo and Related Insignia, and the Governance of its Visual Character and Digital Presence (SG-4)* and reflects the current practices regarding:

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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 brand and studio manager ([veronique.verthuy@concordia.ca](mailto:veronique.verthuy@concordia.ca)) to request the University's official logo and any official photography.

### **2. Logo use by Clubs, Groups, Organizations or Associations**

The decision to grant permission to a club, group, organization or association (hereinafter referred to individually and collectively as "Group") for the use of the University's name, name logo and/or insignia 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, logo and/or insignia 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 and objectives;

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- 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 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).

Exceptions include:

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

### **4. Licensing Program**

All applications for the use of the University's name, logo and/or related insignia for commercial purposes shall be made, in the first instance, for conditional approval of the application, to the [Manager, Purchasing and Merchandising for Concordia Stores](#)

Upon conditional approval of the application, the potential licensee shall submit designs incorporating the University's name, logo and/or related insignia as well as product samples for initial approval by UCS and final approval by the Secretary-General.

Following approval by the Secretary-General, a non-exclusive, revocable licensing agreement shall be entered into with the licensee. The licensing agreement shall apply for a specific term and shall 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, logo and/or related insignia 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.

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### 5. Websites

#### *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

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

Websites from the following units can apply to be exempt from the 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
- Research labs, groups or projects when Concordia's WCMS cannot offer the functionality required

To apply for an exemption, a unit must submit a written request to UCS Web Communications ([webcoord@concordia.ca](mailto:webcoord@concordia.ca)).

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 & 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

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 use, 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.

**Request submission process:** To begin the process of either moving a website from Concordia.ca or migrating a website to the WCMS, the following information must be provided in writing to UCS Web Communications ([webcoord@concordia.ca](mailto:webcoord@concordia.ca)):

- 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:
  - On which server is the website hosted?
  - Who is responsible for managing the website?
  - Which academic department is affiliated with the research group and/or lab?
  - Who is the website's target audience? (e.g., current students, prospective students, current faculty, prospective faculty).
  - Is the website running on a third-party application?

**Evaluation:** UCS Web Communications and the Digital Asset Steering Committee will review the written request and contact the unit in question to discuss how to best move the site from the Concordia.ca domain to an alternative domain name.

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

### *b. Requests to house websites outside of the WCMS and/or Concordia.ca domain name*

Notwithstanding the above mentioned exceptions (section 5a), academic and administrative units may request to house websites outside of the WCMS—either using the Concordia.ca domain name or an alternative domain name.

**Request submission process:** A unit may provide its written request to have its website housed outside of WCMS, to UCS Web Communications ([webcoord@concordia.ca](mailto:webcoord@concordia.ca)). This request must include the following information:

- Why must this website live outside the University's web content management system? (ie: WCMS doesn't offer capabilities x, y, z)
- On which server will the website be hosted?
- Who is responsible for managing the website?
- Which academic department is affiliated with the research group, centre, unit and/or lab?

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- Who is the website's target audience? (e.g., current students, prospective students, current faculty, prospective faculty).
- Is the website running on a third-party application? AND
- Why does the website need to use a Concordia.ca domain name? OR
- Why does the website have to be housed outside the Concordia.ca domain?

**Evaluation:** UCS Web Communications and the Digital Asset Steering Committee will review the written request and contact the unit in question.

**Timeline:** A prospective timeline for creating or migrating a unit's website will be established pursuant to discussions with UCS.

### *c. Requests for alternate web domain names*

Concordia.ca websites that run on the WCMS will adopt suffix domain names (e.g., Concordia.ca/artsci). However, there are exceptions that may retain their prefix domain names.

**Request submission process:** If your unit's website or application is not part of the WCMS and would like to request a Concordia.ca domain name, as well as a vanity URL, please email [webcoord@concordia.ca](mailto:webcoord@concordia.ca) and explain the purpose for which you require a domain name, or vanity URL.

**Evaluation:** UCS Web Communications will review the written request and contact the unit in question.

**Timeline:** A prospective timeline for creating or migrating a unit's website will be established pursuant to discussions with UCS.

### *d. Requests for major changes to Concordia.ca and Cspace*

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

Any major changes should be first discussed with the unit's Communications Advisor prior to submitting a request. Units without a Communications Advisor are invited to contact [webcoord@concordia.ca](mailto:webcoord@concordia.ca)

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**Request submission process:** A unit may provide its written request for major changes to the Concordia.ca website and to Cspace, to UCS Web Communications ([webcoord@concordia.ca](mailto:webcoord@concordia.ca)). This request must include the following information:

- Is the change for Concordia.ca, Cspace or both?
- Does the change involve information architecture, visual redesigns and/or the development of new features and functionality?
- Describe the requested changes in detail.
- Who is the website's target audience? (e.g., current students, prospective students, current faculty, prospective faculty).
- Why are you requesting this change?
- Do you have analytics to accompany your request?

**Evaluation:** UCS Web Communications will review the written request and contact the unit in question.

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

### 6. Website Access and Maintenance

Members of the Concordia community may request access to specific pages within the Concordia.ca website as per the conditions outlined in the [AEM Web Training and User Access Agreement](#). 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 author and updater, to one of support for the trained user. Unless large changes 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, creation/deletion of multiple pages, page moves and creation of folders.*

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### 7. Institutional Social Media Accounts

#### *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 (socialmedia@concordia.ca), who will review the written request and contact the unit in question to discuss optimal solutions.

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: 99,000+ followers
- Concordia Twitter: 70,000+ followers
- Concordia Instagram: 22,000+ followers
- Concordia LinkedIn page: 216,000+ followers
- Concordia YouTube: 8,700+ channel subscribers
- Concordia Flickr: 3,100,000+ views

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?



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### *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?

**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).

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### *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 ([socialmedia@concordia.ca](mailto:socialmedia@concordia.ca)) for assistance *at least two weeks before the start of the campaign or event* 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.

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

#### *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 write a proposal that contains the following information and email it to ([webcoord@concordia.ca](mailto:webcoord@concordia.ca)):

- What is the motivation behind the requested content?
- Who is the target audience?
- Project summary
- Project stakeholders
- Technical/user requirements
- Future maintenance (effort and costs)

**Evaluation:** Representatives from both UCS and IITS meet monthly 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.