



Annex 1

Commercial Trademark Guidelines for Merchandise Purchases

The commercial trademark policy outlines the use of Bishop's University and its logo or symbols. In simple terms: *The University holds exclusive use of trademarks pertaining to Bishop's University, Bishop's, Gaiters, B.U., the crest, logo, or any mark, logo, letters or combination that suggest a trademark connection with the University.*

The University, however, through a contractual obligation with Follett (Bookstore Management), transfers to them the exclusive right to sell products "*traditionally bought and sold in college bookstores*". As such, all Bishop's University merchandise should be purchased/sold through the University Bookstore. This is in keeping with the exclusivity contract between the University and Follett, and also ensures standards around brand guidelines and quality are maintained.

A. Bishop's University - Internal departments or affiliated groups/organizations

In order to respect the exclusivity contract with Follett, when ordering clothing, lanyards, hats or other Bishop's clothing/gear, the Bookstore must be given the first opportunity to provide such merchandise to internal departments (academic departments, administrative units) or affiliated groups/organisations. The University is, however, aware that more affordable options may exist and is also conscious of the fiscal restraints in place at the University. As such, the following procedure should be followed when any internal department or organization is planning to purchase promotional or other material not intended for resale:

1. Meet with the Bookstore Manager to discuss item(s) and determine if the item(s) is something the Bookstore is able to provide.
2. If the item(s) is available through the Bookstore, the Bookstore has first right to provide a competitive quote to produce the item(s).
3. Managers and department chairs or their designate may choose to seek a quote from an outside vendor for said item(s).
4. To ensure brand guidelines are maintained, design elements must be approved by the University Advancement Office, by the Communications Manager and/or the Director of University Advancement. Please provide final artwork/design prior to placing the order. The Brand Approval Form (Appendix A) must be completed and must be attached to the invoice for payment.

5. If the decision is made to use an outside vendor a copy of the detailed quote should be sent to the Bookstore Manager for tracking and comparison purposes.
6. When submitting the invoice to the Business Office for payment, please attach a copy of the quote, as well as the quote from the Bookstore, or memo (Appendix B) from the Bookstore Manager indicating that Follett was not in a position to quote on the item(s), or that their quote was not competitive, must also be included for the invoice to be processed.

B. Students' Representative Council and affiliated clubs, groups or organisations – Fundraising

A number of student organizations (all recognized SRC clubs, organizations and societies, as well as other University recognized student organizations), from time to time, wish to produce their own Bishop's related material, either to sell to members or to sell more broadly as a way to raise money for their organization or another charity. While the University is pleased that student organizations wish to show their pride in Bishop's, and have valid reasons for pursuing the sale of merchandise, any item(s) which include the Bishop's University name, logos, or suggestion of a connection to the University must adhere to the Commercial Trademark Policy. As such, these guidelines must be followed by all student organizations (with the exception of the SRC when producing items for major University wide events such as Orientation Week - they are subject to guidelines above):

1. Meet with the Bookstore Manager to discuss item(s) and determine if the item(s) is something the Bookstore is able to provide.
2. If the item(s) is available through the Bookstore, the Bookstore has first right to provide a competitive quote to produce the item(s) within five working days.
3. The student organization may choose to seek a quote from an outside vendor for the item(s).
4. To ensure brand guidelines are maintained, design elements must be verified by the SRC General Manager; and the approval of the University Communications Manager and/or the Director of University Advancement may be required at the request of the General Manager. Please provide final artwork/design prior to placing the order, and use the Brand Approval Form for Student Organizations (Appendix C). A copy of this form will be kept by the SRC General Manager, with a copy sent to the Communications Manager (University Advancement Office) for their files.
5. If the decision is made to use an outside vendor a copy of the detailed quote should be sent to the Bookstore Manager for tracking and comparison purposes. The Bookstore Manager will provide a memo (Appendix B) within five working days which will confirm the fact that the Bookstore was given the opportunity to quote.
6. A **10% royalty fee**, based on the total cost (after taxes) of producing the item(s), is payable to Bishop's University. This fee must be paid within 30 days of the invoice date. A copy of the final invoice, Appendix B and C, along with the royalty fee is to be directed to the Director of Finance.

C. Organizations/Individuals Planning to Sell Items for Profit

This trademark clearly states that the University, and by extension our Bookstore, have exclusivity with respect to the Bishop's University name, logos etc. The University/Follett will not permit outside groups or businesses to produce and profit from the Bishop's University trademark. The University does, however, recognize and celebrate the entrepreneurial drive of our students. As such, should a student wish to produce Bishop's related material which he/she wishes to sell for a profit, the same guidelines as outlined above are in effect, with **the sole difference being a 20% royalty is payable to Bishop's University.**

D. Athletics

The Gaiters brand is directly tied to Bishop's University and plays an important role in terms of external exposure and pride in the University. As such it must be managed judiciously. The 2008 University Brand and Visual Identity Guidelines included a section specific to Gaiter Athletics which should be adhered to. The Director of Athletics, in consultation with the Director of University Advancement (when required) is responsible for maintaining consistency and brand use of the Gaiters logo.

Gaiter branded clothing for resale should only be made available through the University Bookstore, and as such the guidelines listed above are in effect with respect to Gaiter apparel.

Much of the Gaiter crested material worn by varsity student-athletes is provided, either free of charge or at a deep discount, through sponsors or apparel providers. This material is not subject to guidelines above, but every effort should be made to ensure adherence to the brand guidelines and goals set out, and overseen by the Director of University Advancement in consultation with the Director of Athletics.

APPENDIX A: Approval Form – Commercial Trademark Use (Internal)

APPENDIX B: University Bookstore Release Form

APPENDIX C: Trademark Approval Use Form (Student Organizations)

APPENDIX D: Brand and Visual Identity Guidelines