

*Presentation to the University Affairs Board
of the Governing Council*



Trademark Licensing Update

Tad Brown
Finance and Development Counsel
Kyle Winters
Director, Marketing Programs

DIVISION OF UNIVERSITY ADVANCEMENT

Tuesday, September 24, 2002



- Background and Introduction
- Administration of Program
- Communication on Campus
- Leadership in Canada
- Conclusion and Questions



Background

The Trademark Licensing Policy was developed and passed by Governing Council in April 2000. This followed several months of consultation with students, staff, faculty and industry experts.



The Policy establishes parameters and guidelines for the ethical and accountable production of products which bear the name or marks of the University, or any of its constituent parts.

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Introduction



In August 2000 the University created the new position of Director, Marketing Programs to manage the licensing program and the implementation of the Trademark Policy.

The first priority was to assess all administrative processes, supplier data and available resources and to recommend an effective strategy and mechanism for overall trademark management.

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The Office of Marketing & Licensing Programs



Responsible for all non-philanthropic revenue generating programs:

SPONSORSHIP programs
AFFINITY programs
TRAVEL programs
TRADEMARK programs

"We create service based synergies within our programs and the university community"



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Administration of Trademark Policy

Appointed Manager of Brand Development and Trademark Programs



Primary Responsibilities :

- University Digital Library of Trademarks
- Trademark Web-Site (www.trademarks.utoronto.ca)
- Automation of all Administrative Processes
- Liaison with Constituencies
- Brand Development
- Primary contact with all licensees
- Accountability report



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ARTWORK APPROVAL FORM

Licensee sends Artwork to Division for approval

Division approves artwork and forwards it to OM&L

University of Toronto – Trademark Licensing Program
 Division of University Advancement – Office of Marketing and Licensing

NRD - Non-Retail Design Approval Form

For inquiries concerning this form, please contact Chuck Chen @ 416.978.0504 or via email: chuck.chen@utoronto.ca

Licensee to complete step 1

Step 1 - Licensee Product Information (fill in info and insert artwork)

Licensee:	Van-Smith Marketing
Product:	Laptop pins
U of T Division:	Office of Marketing and Licensing – Alumni Travel Program
Date:	March 1, 2002

Please insert artwork in JPEG format in space below and indicate "yes" for all artwork placement(s)

Front:	Yes	Side / Sleeve:	
Back:		Other:	



Product Code (if applicable):

Re-email this file (as an attachment) to the U of T division for approval.

U of T division to complete step 2

Step 2 - U of T Divisional Authorization (artwork approval)

Artwork approved by:

Name:	Uguzhan Tuz
U of T Division:	Office of Marketing and Licensing

Re-email this file (as an attachment) to the Office of Marketing and Licensing, Attn: chuck.chen@utoronto.ca

OR

Send back to licensee with the following revisions
 (licensee to submit new form with new artwork to divisional office for approval)

Revisions:

ARTWORK APPROVAL FORM

OM&L verifies artwork and approves production, this triggers accountability process

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Office of Marketing and Licensing to complete step 3

Step 3 - Office of Marketing and Licensing Verification

Artwork verified by:

Name:	Chuck Chen
Signature:	
Date:	March 1, 2002

A copy of this form will be forwarded to U of T division and the licensee

OR

Send back to licensee with the following revisions
 (licensee to submit new form with new artwork to divisional office for approval)

Revisions:

A copy of this form will be forwarded to U of T division



PRODUCT DELIVERY FORM

Licensee forwards copy of delivery form to OM&L for every delivery

Factory location is printed on form

Used as a "licensee accountability"



University of Toronto – Trademark Licensing Program
Division of University Advancement – Office of Marketing and Licensing

NRP - Non-Retail Product Delivery Form

For inquiries concerning this form, please contact Chuck Chan @ 416.970.6564 or via email: chuck.chan@utoronto.ca

Upon delivery of product order, licensee to complete step 1 and email this form (as attachment) to the Office of Marketing and Licensing, Attn: chuck.chan@utoronto.ca
Non-Retail Product Delivery Form (NRP) must be sent within 10 business days of product delivery.

Licensee to complete step 1

Step 1 - Code of Conduct for Licensees

The products described in this document have been delivered to the University of Toronto, and are subject to the policies that govern Licensing and Trademark Administration.

Product Information:

Product:	Lapel pins
U of T Division:	Alumni Travel

This product was created in the following location:

Factory Name:	CNUJ
Factory Location:	Montreal Quebec
Country:	Canada

By completing this form, I affirm the information provided to be true and accurate to the best of my ability.

Is this product U of T Code Compliant?	Yes
Licensee Name:	Vive-Smith Marketing
Date:	March 1, 2002

Now please email this form to the Office of Marketing and Licensing, Attn: chuck.chan@utoronto.ca

Administration of Trademark Policy

Creation of "Digital Library" presently underway

sample - "primary information"

FIRST TAB - TRADEMARKS

To include contents (sections 1-9 of Data Entry Screen):

1. Trademark Name
2. Division
3. Graphic of Trademark
4. Classification
5. Brand
6. Number
- 7 Status
8. Expiry Date
9. Registration Date

Communication



Three key approaches to communicating the benefits have been undertaken



MASS COMMUNICATION

- Letters to Deans, Directors collecting information about suppliers
- Letters to senior management regarding Licensee Fairs
- Presentation to Senior Development Offices
- Letters to divisional suppliers

PERSON TO PERSON

- Meeting with divisions that normally purchase in bulk (Phys-ed, Hart House, Facilities and Services etc..)
- Meetings with SAS, SAC, APUS & GSU

INTERACTIVE LICENSING EVENTS

- Licensee Fair
- SAC Orientation Leather Jacket Draw
- Lunch and Learn Sessions

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Leadership in Canada

INVOLVEMENT WITH ICCLA

- UofT actively participates in the International Collegiate Licensing Association
- Co-presented branding seminar with UCLA, Berkeley and Harvard at North American Spring Conference

INVOLVEMENT WITH INTERNATIONAL MONITORING ORGANIZATIONS

- Close working relationship with both WRC and FLA
- Looking to develop Canadian consortium model for verification systems



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Leadership in Canada

BRAND-AID



CANADIAN COLLABORATION

- Working closely with Canadian Universities to establish coordinated resources for all
- coordinating "Brand Aid", a one day workshop for Trademark Administrators in Toronto Sept. 30 -16 universities from coast to coast will be participating
- consulting on next steps with social activists and other expert resources



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Conclusions and Questions



Working closely with student leaders, industry experts and other Canadian Universities

Working closely with the university community as a service based office

Working with International Monitoring Organizations to develop Canadian centralized model

Visit the UofT Licensee Fair on Tuesday, October 15 at Hart House



Visit our website at www.trademarks.utoronto.ca

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