



MEMORANDUM

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TO : ALL CONCERNED UNITS

THRU : LIZETTE MARGARET MARY J. RACELA
President and CEO

FROM : JAIME JUAN RAMON N. VALERA III
Head – Corporate Planning & Communications Division

CONCURRED BY : ERNESTO O. OLAVARIO
Chairman – Opscom

SUBJECT : CORPORATE EVENTS AND COMMUNICATIONS
MANAGEMENT GUIDELINES

DATE : AUGUST 3, 2021

Please refer to the attached Corporate Events and Communication Management guidelines with its Annex – Corporate Social Responsibility Guidelines.

These guidelines are uploaded to the LIS.

For your guidance.



A. CORPORATE EVENTS MANAGEMENT GUIDELINES

I. Introduction

UCPB Savings Bank (UCPBS) has designed its products and services in order to be the Bank of choice in the communities and a catalyst for financial inclusion. The involvement of the customers, employees and shareholders in the achievement of the Bank's vision is not only limited to banking and business transactions but is extended in order to build a lasting partnership. As a support, the Bank shall conduct internal or external corporate events.

II. Objectives

1. Foster business and interpersonal relationship;
2. Widen network;
3. Provide a proper venue and avenue for recognition;
4. Promote products and services;
5. Reach out to the community;
6. Strengthen community financial awareness; and
7. Recognize each stakeholder.

III. Scope

UCPBS' corporate events include the following but not limited to:

1. Accredited agencies and companies' seminars;
2. Business and economic conferences;
3. Trade or road shows;
4. Product launching;
5. Marketing and promotional campaigns;
6. Awards, recognition and incentive events;
7. Appreciation affairs;
8. Annual stakeholder activities;
9. Branch inauguration and blessing;
10. Corporate Social Responsibilities; and
11. Financial education programs

IV. Definition of Terms

1. Big Corporate Events:
 - Nationwide or bank wide events
 - Regional events
 - Events involving more than 1 Division (excluding CPMD-MU)
2. Small Corporate Events:
 - Events involving a Branch or 1 Division

- Events within the Head Office
3. Promo-promotional event that draws attention to a particular product or service of the Bank.

V. Guidelines

Action	Guidelines	Remarks
1. Request for the event	a. Division shall submit to the Marketing Unit (MU) a duly accomplished Marketing Request Form (MRF): • Big events – 3 months prior to the event date; • Small events – 2 months prior to the event date; and • Promo – 10 months prior to promo launching This will provide both parties reasonable time for planning up to the implementation. b. Annual events regularly scheduled by the Bank do not need an MRF; and c. Events under the responsibility of MU do not require an MRF.	
2. Identify event objective and expected output	a. Objectives of the event shall be identified by the Division in order to come up with the appropriate program content/ format, guests and participants, theme, venue and related activities. b. The expected output shall be used as one of the bases for the evaluation of the event.	
3. Formulate a time line or action plan	a. This will serve as a tracker for all actions which should be done at a given time and the person-in-charge for its accomplishment. b. A 2-week leeway shall be considered for delivery delays and unforeseen circumstances.	

4. Budget	a. Event must be budgeted; b. Expenses must be realistic and reasonable; c. Vendors and suppliers, as well as procurement shall be managed by the Procurement Unit (GSD), per 9184; d. The following steps shall be followed: - Division and MU shall coordinate for the specific requirements of the event; - Requirements shall be submitted by the Division to GSD for quotations and procurement; and - Procurement unit shall inform the Division and MU on the availability of the requirements: - Big events – 2 months prior to the event; - Small events- 1 ½ months prior to the event; - Promo – 6 months prior to the promo launching; e. Necessary cash advances (CA) shall be requested by the personnel of the Division, unless the corresponding budget is under MU.	
5. Select an appropriate venue	a. Venue may be: f. External – hotels, restaurants, events place, school, other agency sites, etc. g. Internal- Bank lobby or conference rooms h. Virtual- MS Teams or other on-line applications available	
- Present final output to the Division, and to Mancom/ Board as requested	a. This will cover items 2-5; while the items will initially be decided by the Division. Should these be presented to the Mancom or Board, the decision of the latter shall be followed. b. Both the Division and MU shall participate during the presentation.	
7. Plan the logistic	a. A committee specific to the event shall be created. A focal person for the following tasks shall be assigned: - Program, hosting and script;	

	- AVPs; - Venue set-up (External, internal or virtual); - Invitation - Catering/ Food - Travel - Accommodation - Logistics - Entries and prizes - Promotion - Post event activities - Evaluation b. The committee members shall comprise personnel from the Division and MU.	
8. Promote the event	a. Promotion of the event shall be done by MU. - Big events- 1 month thru email blast - Small events- 2 weeks thru email sent specifically to the invited guests and participants - Promo- 3 months prior to promo launching	
9. Evaluate the event	a. In order to assess the entire event, an evaluation shall be done. b. For events with total attendees of 100 and above, 20% shall be requested to answer the evaluation sheet; c. For events with less than 100 total attendees, all participants shall be requested to answer the evaluation. This will determine if the objectives and purpose of the event were met and if there are other areas which need improvement. The result shall be presented to Mancom or the Division.	

Refer to Annex A for Corporate Social Responsibilities Guidelines.

B. CORPORATE COMMUNICATION MANAGEMENT GUIDELINES

I. Introduction

The highest standards to protect the interest of financial consumers, its stakeholders and the general public in conducting ethical business practices have always been one of UCPB Savings Bank's (UCPBS) priorities.

The Bank ensures that its customers have a reasonable holistic understanding of the products/services which they may be availing. Communication for existing and new Bank products and services for social media, traditional media, annual reports or news bits and other communication channels should be reliable, concise and clear.

II. Objectives

1. Release marketing collaterals, social media and website information, and other forms of communication in a clear, concise, accurate and understandable manner;
2. State and maintain the Bank's brand across all clients and the communities;
3. Highlight the Bank's progress and developments through the annual report and news bits releases; and
4. Promote products and services through public relations initiatives.

III. Guidelines

Description	Guidelines
1. External Communication	1. External corporate communication shall cover the following channels: • UCPBS Website; • Social Media; • Internet information; • Publications; and • Other authorized external communication channels. 2. Division shall submit to the Marketing Unit (MU) a duly accomplished Marketing Request Form relative to the information to be released: • Nationwide promos- 6months- 1 year prior to promo launch; • Division promo with accredited Bank partners - 3 months prior to promo launch;

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	• Event support- 1 month prior to the event; • Anticipated announcements- 2 weeks prior to release; • Incidental announcements- immediately, provided that a representative from the Division will work with MU until the information is released. 3. Communication under MU does not require a Marketing Request Form (MRF) .
2. Internal Communication	1. Internal corporate communication shall cover the following channels: • UCPBS email; and • Intranet; 2. Division shall submit to the Marketing Unit (MU) a duly accomplished Marketing Request Form (MRF) relative to the information to be released: • Nationwide information or promos- 6months- 1 year prior to promo launch; • Division promo - 3 months prior to promo launch; • Event support- 1 month prior to the event; • Anticipated announcements- 2 weeks prior to release; • Incidental announcements- immediately, provided that a representative from the Division will work with MU until the information is released. 3. Communication under MU does not require an MRF.
3. Annual Report (AR)	1. MU shall be responsible for the following: a. Release of BSP AR requirements to the Division Head and their representative; b. Coordination and meeting regarding the procedure to be done and time line; c. Proof reading of the article provided; d. Necessary revision; e. Routing of the draft for corrections or approval; f. Design, concept and lay-out; and g. Production. 2. Data and details required shall come from the designated Division. A draft shall be submitted to MU for necessary revision and proof reading. 3. Time line shall be strictly observed as this is a regulatory requirement from BSP.
4. Releasing of information	1. MU shall facilitate the content and design as requested; release shall follow once the final draft is approved by:



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	✓ Division Head ✓ CPMD Head 2. Unless otherwise, it shall require approval of BCD, LSD and the Office of the President.
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ANNEX A – CORPORATE SOCIAL RESPONSIBILITIES GUIDELINES**I. Introduction**

The missions of UCPBS are to strengthen partnerships with its clients through personal and proactive services, nurture a culture of good values among the associates, and exercise prudence in managing the Bank's resources and deliver proper financial returns to the shareholders.

While the Bank considers its clients, employees and shareholders as integral components, it is its unwritten commitment to be of service of the growing communities it serves by giving back in simple and significant ways, UCPBS integrated Corporate Social Responsibility (CSR) activities in order to achieve a balance of economic and social imperatives, while at the same time making an impact to the community.

II. Objectives

1. Create a sense of responsibility and positive impact towards the community;
2. Foster loyalty among clients;
3. Establish partnerships;
4. Engage employees;
5. Reach out to the community;
6. Provide free marketing and an opportunity of branch awareness; and
7. Widen network.

III. Scope

UCPBS' corporate CSR include the following but not limited to:

1. Sponsorships;
2. Donation campaign;
3. Medical outreach;
4. Charitable giving;
5. Tree planting and other environmental support;
6. Clean-up drive;
7. Educational support; and
8. Partnership with government and non-government agencies.

IV. Definition Of Terms

1. External – CSR initiated by government or non-government agencies, participated by UCPBS as a response to a campaign or drive; and
2. Internal



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Types:

- a. Proposed – CSR initiated by MU or any UCPBS employee at a given time.
- b. Emergency – CSR initiated by MU or any UCPBS employee because of a natural or mandate calamity or accident

V. Guidelines

Description	Guidelines
1. External CSR	a. Documents related to the CSR activity shall be forwarded to MU for acknowledgement; b. Participation of the Bank shall be determined according to; • Budget • Resources (manpower or material) • Employees' willingness to cooperate • Risk • Schedule and the like c. Proposal shall be submitted to Corporate Planning, Communication and Marketing (CPCMD) Division Head for approval and presentation to Mancom if required; d. Once approved, MU shall coordinate with the involved Divisions to materialize the activity eg. HRD, GSD, OP; e. A committee maybe created to facilitate specific areas of the activity; f. Campaign for the CSR shall be done thru email blast; and g. Post activity evaluation shall be done (refer to Corporate Events Management Guidelines Section V.9.)
2. Internal CSR	
a. Proposed CSR	a. Division shall submit to the Marketing Unit (MU) a duly accomplished Marketing Request Form, (MRF) a month prior to the event. This will provide MU a reasonable time for planning the CSR. b. Participation of the Bank shall be determined following Section V.1.b herewith; c. Proposal shall be submitted to the CPCMD Head for approval and presentation to Mancom if required; d. Once approved, MU shall coordinate with the involved Divisions to materialize the activity e.g. HRD, GSD, OP; e. A committee may be created to facilitate specific areas of the activity; f. Campaign for the CSR shall be done thru email blast; and g. Post activity evaluation shall be done (refer to Corporate Events Management Guidelines Section V.9.)
b. Emergency CSR	a. Associate may directly get in touch with MU thru any given means; b. Proposal shall be submitted to the CPCMD Head for and the President for approval;

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	c. Campaign for the CSR shall immediately be done thru email blast; and d. CSR shall be implemented accordingly. e. Events under the responsibility of MU do not require an MRF.
3. Budget	Source of Budget can be: a. Corporate Social Responsibility Bank Budget; and b. Donations
4. Management of Donated Cash	1. Cash donations can be coursed thru to the following: a. CSR Joint Account • 2 designated Mancom members , the CPCMD Head and Controllershship Division Head , shall open a joint (And) account for this purpose at UCPB Kalayaan Branch; and • Branch or external donations or other related financial resource shall be deposited in this account. • The account shall be subjected to spot audit by the Bank's internal auditor. b. CPCMD designated Associate • A CPCMD working on site shall be designated to receive any donation from the Head Office; • Amount shall be properly received and logged; and • Signature confirming the receipt of the amount indicated shall be required. c. Human Resources Department • MU shall request for the approval of HRD Head and Compensation and Benefits Head for a payroll deduction for pledges coming from the employees; • Deduction of the pledged amount shall be done on a specified date; and • The amount shall be released payable to the beneficiary agency or representative. This will be supported with an official receipt. 2. Liquidation of expenses Expenses shall be properly liquidated to the 2 Mancom designate, subject to internal audit.

Document History:

Version	Date	Circular Number	Particulars	Updated by
1	08/3/2021	Sel. Cir. 02-084/2021	Corporate Events and Communication Management Guidelines	C. Vaquilar /J. Aya-ay /A. Meneses