

# **Global Brand and Communications Policy**

**June 2023**

## 1 Purpose

This policy provides a framework for Oxford Policy Management (Oxford Policy Management Limited and all entities within its group (collectively referred to as “**OPM**”) to:

- manage its marketing, communications, and public relations to strategically engage with its stakeholders
- embed processes which manage OPM’s brand, enhance its reputation, and support its strategic goals, vision, mission, and purpose; and
- manage the use of OPM’s logos or marks internally and externally when used by others.

It outlines responsibilities in relation to marketing and communications at OPM. OPM is also referred to in this policy as **we**, **us** and **our**. Anyone who breaches this policy may be subject to disciplinary action. See the section on “Responsibility” for more information.

## 2 Scope

OPM’s brand is a valuable intangible asset. A brand is: “The set of attributes of a product or service, together with the beliefs and expectations surrounding it - a unique combination which the name or logo of the product or service should evoke in the mind of the audience.” (Chartered Institute of Marketing). It is the way in which the organisation is viewed externally, which OPM tries to influence to create meaningful associations in the minds of our audiences. OPM’s brand helps to distinguish our offerings and our organisation in the competitive development consultancy space, helping audiences to find, choose, and trust OPM. Our brand is integral to how our image and reputation is perceived by stakeholders. It expresses our mission and values, strategic vision, mission, purpose, and culture. For this reason, the OPM Board has responsibility of the OPM brand and its associated reputation; oversight of this policy sits with the Senior Management Team as delegated by OPM’s Board and the Communications and Marketing Team holds responsibility for the day-to-day management of OPM’s brand, including the implementation of this policy.

This policy applies to all persons and entities working for or on behalf of OPM in any capacity, including employees, agency workers, casual workers, seconded workers, volunteers, and interns, all of whom are referred to in this policy as **staff**, **You** and **Your**.

This policy applies to all OPM communications. It is supported by, and must be read in conjunction with, the OPM Social Media Policy, Global Media Engagement Policy, and OPM Brand Guidelines.

This policy applies to all areas of Oxford Policy Management’s work, including its projects.

This policy will be reviewed on a biennial basis by the Head of Communications and Marketing. Any changes will be approved by the Senior Management Team.

## 3 Principles

All communications within and from OPM and its staff must:

- be accessible, open, and transparent;

- provide clear and well-judged information at the most appropriate level of detail in relation to the needs of the reader or user;
- support OPM's professional reputation;
- be relevant, accurate, and timely;
- enable meaningful engagement with stakeholders;
- reflect the principles of confidentiality, data protection, freedom of information, privacy and electronic communication regulations, and other relevant legislation; and
- improve the clarity with which the values and identity of OPM are understood.

You must respect and care for the reputation and image of OPM and conduct yourself in accordance with OPM's Code of Conduct, Global Social Media Policy, Global Media Engagement Policy, and all other relevant policies at all times and in all communications.

## **3.1 OPM brand identity**

The Head of Communications and Marketing is responsible for the Communications and Marketing team, which develops, manages, and maintains the OPM brand identity and brand guidelines.

### **3.1.1 OPM brand identity**

The OPM logo is the main visual identifier for OPM. The appearance of the OPM logo on any communication implies a level of endorsement by OPM of that message to the intended audience. Any OPM communication developed for, or able to be accessed by an external audience, must use the OPM logo. All OPM communications must accurately and professionally reflect the OPM brand identity as outlined in the [OPM Brand Guidelines](#).

The OPM logo and 'Oxford Policy Management' word mark are registered trademarks and are therefore protected in law. The Communications and Marketing Team manages all trademarks, working in conjunction with OPM's Legal team. All OPM logos or marks, including proposed new marks, are owned by OPM and managed by the Communications and Marketing Team, including decisions to permit or licence the use by a third party of the OPM logo.

### **3.1.2 Co-branding**

You must ensure that OPM's branding is as prominent as possible on all project outputs. Where OPM had led or partnered in the delivery of a project, You must make every effort to ensure that OPM's logo appears alongside other partners, funder or project logos, including seeking contractual safeguards for the brand as part of any contract negotiations and agreeing guidelines with the funder and/or partners to dictate how this appears on project communications. You should exercise Your judgement in how far this is possible to demand. Please refer to OPM's Brand Guidelines for more information on the practicalities of using the OPM logo.

The OPM Brand Guidelines are the main reference point for using the OPM brand.

### 3.1.3 OPM project brands

An approved project brand may be used in communications developed for, or able to be accessed by, an external audience, where the communication solely or predominantly relates to that project. A project brand is a separate, external-facing identity, including items such as a name, logo, and styles (colour palette and typography) in brand guidelines, for a project where it will be the lead identity for that project.

All proposals for project branding must be reviewed and approved by the Communications and Marketing Team. Project Managers/Directors must alert the Communications and Marketing Team as early as possible in the project to the potential need for a project brand..

### 3.1.4 OPM sub-brands

In the event that You wish to develop an OPM sub-brand, You must:

- make a formal request in writing to the Head of Communications and Marketing, who will review the request, consulting the relevant Senior Management Team members.
- have support from the relevant Practice or Office Lead and relevant member of the Senior Management Team.

Sub-brands must be approved by OPM's Senior Management Team.

The development of a sub-brand will only be approved:

- where the Senior Management Team is satisfied that the functions or activities of the proposed area that the sub-brand would apply to is separate from those of OPM, or where the development of a sub-brand would substantially improve the capacity of the area of OPM to market its goods or services in a competitive market; and/or
- where OPM, through the Senior Management Team, has entered into a legal agreement involving the establishment of a distinct or separate entity and, by agreement of the parties, the development of a sub-brand is expressly approved in the agreement.

### 3.1.5 Approval to use the OPM identity

#### Pre-approved use

There are a range of approved branded templates that have been developed by the Communications and Marketing Team for use by staff in external communication. In the examples below, the use of the OPM identity in an approved branded template or style is pre-approved, and their use is compulsory unless a client specifically requests another format:

- Word Report, expression of interest (EOI), financial and technical proposal templates
- OPM Excel templates
- OPM PowerPoint template
- Official stationery
- OPM email signature

These templates and information on their use can be found in the Brand and Reputation site on OPM's intranet.

The production of any other corporate materials, must be managed by the Communications and Marketing Team. These include, but are not limited to:

- OPM Capability Statement and other marketing leaflets
- OPM publications, including working papers and briefing notes
- OPM business cards
- OPM event banners, invitations, and any other branded event materials
- OPM e-newsletter
- OPM Microsoft Office templates
- Internal and external OPM office signage

Latest versions of OPM marketing leaflets, Capability Statements, and publications are available on the OPM website.

## Requesting approval

Any OPM branded communications materials that are produced for an external audience and do not use the pre-approved templates listed above must be sent to the Communications and Marketing Team for review and approval prior to finalisation and publication.

## Requesting approval – third parties

It is important to protect OPM's brand from negative associations and put controls in place to screen the brand's use by non-OPM entities to protect our reputation. Requests by a third party to use the OPM logo must be submitted in writing to the Head of Communications and Marketing for consideration for approval. The following conditions will be considered in the assessment process:

- The logo must not be manipulated in any manner except for the proportional scaling of the graphic as a whole elements.
- The logo must not be used in a misleading or deceptive way, for example where use of the OPM logo might falsely represent or imply OPM endorsement of products or services.

Examples of third-party use of the OPM logo include, but are not limited to:

- sponsorships (such as conferences, events, exhibitions, partnerships with external organisations);
- placement on an external website; or
- promotion of an event or activity for which OPM has agreed to be involved.

Once the Head of Communications and Marketing has approved, a member of the Communications and Marketing Team will - subject to the third party having successfully undergone other OPM processes, if any, for engaging third parties e.g. due diligence, legal review of contract etc. - provide the appropriate OPM logo and Brand Guidelines to the third party.

### 3.1.6 Unauthorised use of the OPM logo

You are responsible for accurately, consistently, and professionally promoting the OPM brand. As such, You must advise the Communications and Marketing Team of any unauthorised use of the OPM logo or identity, that You are or become aware of.

Where unauthorised use of the OPM logo by a third party has occurred, a member of the Communications and Marketing Team will contact the third party and manage the removal of the logo as quickly as possible. Where relevant, OPM will seek written assurances from the third party that all reasonable steps will be taken to ensure that the unauthorised use does not reoccur. The Communications and Marketing Team may refer cases to the Legal team to assess whether we have a claim against the third party as to the misuse or misrepresentation of OPM's brand.

## 3.2 Crisis communications

Any incidents, activities or media coverage that may lead to negative perceptions or publicity must be conveyed to the Head of Communications and Marketing as early as possible so facts can be gathered, relevant stakeholders alerted, and timely responses can be made as needed.

The Head of Communications and Marketing will judge whether to escalate these incidents to OPM's Critical Incident Management Team (CIMT) given the legal, security, financial, and reputational ramifications that the event, or OPM's response to the event, may have. Critical Incidents are managed through the CIMT Protocol, managed by the CIMT Coordinator in Legal and Business Governance Team.

The CIMT have ongoing responsibility for managing communications during and after a crucial incident event. The Decision Maker (a member of the Senior Management Team) will have ultimate responsibility for any communications during the CIMT incident and will draw on the expert knowledge and support of the Head of Communications and Marketing as a member of OPM's CIMT. All communications that are produced for dissemination to OPM stakeholders during a CIMT response must be reviewed by the Head of Communications and Marketing and approved by the Decision Maker before distribution.

## 3.3 Websites

The OPM corporate website, [www.opml.co.uk](http://www.opml.co.uk), is the single website presence for OPM activities and operations. OPM does not have separate websites for different areas of its business.

From time to time, individual OPM projects may seek to develop a website to support the aims and objectives of the project. Prior to developing the separate or distinct website, the Project Manager/Director managing the project must consult with the Communications and Marketing Team with regards to design, use of brand, compliance with legislative requirements, copyright, procurement of web development agencies, and overall fit with the OPM communications policies, processes, and infrastructure.

The development of any project websites must be done in accordance with the Data Protection Policy and Principles for Digital Development, of which OPM is a co-signatory. It is the Project Manager/Director's responsibility to ensure that all legal requirements (such as ensuring correct data management protocols and privacy and cookies policies are in place) and any digital

compliance requirements set out by donors are adhered to. The Communications and Marketing Team and Legal and Business Governance Team will provide guidance in meeting these requirements.

The Project Manager must submit all relevant digital information, including but not limited to website CMS and Google Analytics logins, domain registration and renewal, server information, and web developer contact details, to the Communications and Marketing Team for central record.

### **3.4 Email newsletters**

The Communications and Marketing Team owns all current and future OPM-branded corporate external-facing email newsletters, ensuring compliance with legislative requirements, copyright, procurement of services, and overall fit with the OPM communications policies, processes, and infrastructure.

OPM teams wishing to develop an email newsletter for their practice area or office must consult the Communications and Marketing Team with regard to the proposal. Anyone wishing to establish a new OPM external email newsletter, must contact the Head of the Communications and Marketing team. The final decision on establishing a new OPM newsletter is with the Communications and Marketing Team. If a new newsletter is launched in a specific practice or country location, the relevant OPM team and Communications and Marketing Team have a shared responsibility for ensuring minimum content levels for the committed newsletters are reached on the monthly or quarterly basis agreed.

The development of any project newsletters must be undertaken in accordance with the Data Protection Policy, which outlines Your responsibilities in relation to the management of personal data, and any internal processes and donor requirements. This includes ensuring that an approved Privacy Notice is available to subscribers at the point of sign-up. The Communications and Marketing Team can support with ensuring newsletters comply with legal requirements.

### **3.5 Social media**

The Communications and Marketing Team coordinates social media marketing activities at an organisational level and provides social listening reporting, analytics, advice, and oversight of OPM's digital marketing activities, including via social media. The Communications and Marketing Team will undertake social media activities for projects and teams provided that reasonable notice is given. In any event, the final decision on what content is posted, when and in what quantity, remains with the Communications and Marketing Team.

Where a project plans to launch social media channels of its own, the Communications and Marketing Team must be alerted in order that any legal, funder, or best practice requirements can be advised as part of the launch. The Project Manager must submit all relevant digital information, including social media platform and monitoring logins, to the Communications and Marketing Team for central record.

All social media activities must be done in accordance with the OPM Global Social Media Policy.

## 3.6 Media and journalists

The Communications and Marketing Team oversees all engagement with Media, including responding to Media requests, advising staff on Media engagement, and approving Media spokesperson opportunities. This applies where a member of staff represents OPM in the Media for OPM business purposes or makes reference to OPM when interacting with the Media in a personal capacity as well as when a member of staff interacts with media in a personal capacity about a subject related to Your role or OPM's work more broadly, even where OPM is not explicitly mentioned. This includes opinion pieces published externally; opinion pieces include, but are not limited to, blog posts, articles or editorial content of any kind.

Where there is an on-going Media relationship as part of a project's communications work, and individual approvals for multiple articles may be arduous or time-consuming, agreement on the level of approvals necessary will be decided at the beginning of the Media partnership with the Head of Communications and Marketing and Project Director.

If a staff member receives a Media enquiry whether in person, by phone or email, the enquiry must be directed to the Head of Communications and Marketing. An OPM member of staff may not give a statement directly to the Media without the appropriate internal approvals having been given for the release of the statement.

All Media engagement activities must comply with the OPM Global Media Engagement Policy.

## 3.7 OPM office signage

Signage forms an important part of OPM's applied visual identity. Signage can be internal or external, affixed to a building or within an OPM office environment, and can be permanent, temporary, or event related.

Where signage needs to be developed for an office, it must comply with the OPM Brand Guidelines and any local legislation. OPM will work to ensure that all office signage complies with local laws if applicable, subject to other implications, such as security. All concepts for signage projects must be reviewed and approved by the Legal team and the Communications and Marketing Team prior to production and installation.

You should submit a formal request for signage jointly to [communications@opml.co.uk](mailto:communications@opml.co.uk) and [legal.contracts@opml.co.uk](mailto:legal.contracts@opml.co.uk)

## 3.8 Multimedia

Multimedia includes audio, images, animations, and video. Any multimedia featuring people must obtain the explicit prior consent to use the image or likeness (including their voice) of any individual to be photographed, recorded or videoed for the purpose of an OPM communication. OPM requires the prior permission of anyone identifiable in an OPM video, audio production or photograph save where this is not practical. This applies to OPM projects as well as to corporate activities, including at events or conferences.

The Communications and Marketing Team will advise any staff member obtaining video footage, audio recordings or photographs in seeking permissions, including providing multimedia release



forms for use. The latest versions of multimedia release forms can be found [here](#). Guidance on obtaining consents and using the release forms can be found [here](#).

All photography must follow the OPM Brand Guidelines, which sets out the OPM photography style, which in turn helps to reinforce our brand identity. Where an image meets the relevant permissions, it should be shared with the Communications and Marketing Team to hold, categorise and own in the central assets library.

Where You are using an external, third-party videographer or photographer, the staff member must ensure that the work created is owned by OPM. You must ensure a contract is in place between the third-party supplier and OPM to ensure that OPM personal data, and the brand, is protected in accordance with the law. All work (raw material and final product) produced by a third-party videography or photography contracting with OPM must become the permanent property of OPM and shall be considered to be copyrighted materials of OPM and be in writing. This is to ensure that the material generated is not sold or provided to another party without the express permission of OPM. All raw footage taken by videographers or photographers shall be provided in the original format, unless an agreement has been reached for conversion of the video or images to another format. Please see section 3.11 Using External Creative Service Providers for further information. The Communications and Marketing team can advise on this where a member of staff needs support.

### **3.9 Industry conferences and networking activities**

If You are to make a speech or presentation about OPM and our work or projects to industry groups, conferences or public meetings, as part of Your normal area of responsibility, You must receive approval from Your line manager prior to accepting such an invitation or submitting a proposal. The Communications and Marketing Team do not need to approve your presentation or the content You are presenting.

You must use relevant OPM branded templates such as the OPM PowerPoint template, in Your presentation, and You can use related pre-approved marketing materials, such branded leaflets, roll-up banners, and OPM promotional materials at events.

Any request by conference organisers to use the OPM logo in conference advertising or materials must be passed to the Communications and Marketing team, as detailed in 3.1.4 above. The Communications and Marketing Team may take the decision to escalate to the Legal team for a legal review as an additional control for protecting the OPM logo and brand.

When attending conferences and events, as delegates and as presenters or speakers, and performing any networking or business development activities, You are representing OPM and its brand, and You must conduct Yourself in line with OPM's [Code of Conduct](#) at all times.

### **3.10 Using and copying third party content and copyright materials**

OPM maintains two annual licences to allow staff to copy and share articles of interest to their work from across a range of publications including newspaper articles, journal papers, and book chapters: the Copyright Licensing Agency (CLA) licence (covering global publications) and the Newspaper Licensing Agency (NLA) media access licence (covering UK newspapers and magazines).

These licences ensure that You do not have to seek permissions from copyright or newspaper owners each time You copy or share these. However, You should keep all copying and sharing to the minimum required, particularly to ensure we keep to the terms of our NLA licence.

The NLA media access allows for occasional copying (rather than “frequent copying”) of both printed and online versions of UK national newspapers. Occasional copying includes: photocopying and printing articles, scanning and emailing the occasional article to a colleague, and occasionally saving copied articles onto an internal computer drive. Frequent copying is defined as repeated copying which often involves the regular sharing of articles to a defined distribution list; Staff should not do this. Frequent copying means that OPM will incur a larger NLA fee and, as such, must be minimised.

The CLA business licence covers copying for books, journals, and magazines, and provides annual blanket cover for all such publications.

### **3.11 Using External Creative Service Providers**

OPM regularly appoints a third party to provide brand-related creative or communication services including, but not limited to, designers, graphic artists, photographers, videographers, copyeditors, website developers (“Creative Service Providers”).

OPM has a series of processes for engaging Creative Service Providers that mitigate possible risks to OPM, such as legal, intellectual property ownership, brand and reputation management, and economic risks. When procuring any external supplier, You should read and follow OPM’s Procurement Policy. These processes ensure:

- legally binding agreements are entered into between OPM and the Creative Service Provider that cover intellectual property ownership and rights;
- strategic oversight of applied OPM branding to protect the OPM brand and reputation; and
- probity and economic risks are addressed by maintaining preferred supplier relationships and optimal procurement practices.

Where You wish to engage a Creative Service Provider, You must first check the preferred supplier list held by Procurement in consultation with the Communications and Marketing Team, to determine if a suitable Creative Service Provider has already been engaged by OPM. If a suitable preferred supplier does not exist, then You must consult with the Communications and Marketing Team to ensure that the appropriate processes are followed, and appropriate Creative Service Providers are engaged.

The Communications and Marketing Team will assess the required business needs against the processes outlined above and provide appropriate support or direction.

### **3.12 Internal Communications**

The Head of Internal Communications, in Human Resources, manages oversight of all OPM company-wide staff communications and engagement channels, including, but not limited to:

- OPM fortnightly staff newsletter

- OPM Staff Briefing events
- OPM leadership kits
- OPM's Senior Leadership communication activities
- OPM's intranet – Global Hub

These channels provide opportunities to engage with all OPM staff, and any staff member who needs to communicate with all staff must contact the Internal Communications team to ensure alignment with other activity and to maximise staff engagement.

From time to time, OPM teams may wish to engage discrete sections of staff with their own team internal activities. There are several approved templates and channels that have been developed for use in these types of staff-led communications. In the examples below, the use of the OPM identity in an approved branded template or style is pre-approved:

- MS Teams
- Global Hub (team sites)/SharePoint

Staff should ensure that their internal profile picture in the Microsoft Office suite is kept up-to-date using a professional photo of themselves to help support engagement and connection across and within teams.

Materials developed for internal audiences, i.e. OPM staff, must be kept internal and not disseminated outside OPM offices. As these events and material may involve the processing of personal data including, special category or sensitive personal data, compliance with the Data Protection Policy and any guidance issued by the organisation pursuant to the Policy must be complied with at all times.

## **4 Responsibility**

The Senior Management Team has overall responsibility for ensuring this policy complies with all legal and statutory obligations.

The Head of Communications and Marketing has day-to-day responsibility for implementing this policy, monitoring its use and effectiveness, and monitoring internal control systems and procedures to ensure they are effective.

Managers at all levels have a specific responsibility for operating within the boundaries of this policy and ensuring that all staff understand the standards of behaviour expected of them.

The Communications and Marketing team:

- develops, manages and maintains all elements of OPM logos or marks, including relevant guidelines;
- provides support and advice on the use of the OPM brand and its elements;
- provides support and advice for strategic marketing activities;
- provides advice and guidance on corporate marketing, communications and promotional activities;

- has oversight of and influence over the OPM web strategy, design of the website and management of homepage content;
- develops the OPM social media strategy and provides advice in relation to and monitors social media activity across the organisation;
- provides advice on implementing appropriate OPM branded communications;
- liaises with Media on all corporate promotional and marketing activities;
- oversees and coordinates OPM's Media activities;
- audits OPM marketing materials as necessary;
- reviews relevant brand related policies, procedures, and guidelines regularly to ensure that they remain relevant and consistent with the OPM's strategic plan and other policies;
- monitors compliance with this policy.

Project Managers or projects with project branding, websites, and newsletters, are responsible for:

- managing their marketing, promotions, and events in a way that is consistent with the approved project branding as well as the OPM's brand and reputation;
- ensuring their communications activities align with OPM's marketing, communications, and positioning strategies, and
- keeping the Communications and Marketing team informed of their communications, marketing, and promotional activities for each calendar year, or as otherwise agreed.

The Human Resources team is responsible for:

- managing OPM's marketing and communications activities for recruitment sourcing and attraction of future staff within policies and guidelines set by the Communications and Marketing team, including recruitment advertising, events, and exhibitions.

All staff have a responsibility for policy implementation by participating and contributing to the success of this policy through their actions and suggestions.

## Compliance with all related OPM policies and guidelines

This policy must be read in conjunction with:

- Anti-harassment and Bullying Policy
- Code of Conduct
- Data Protection Policy
- Disciplinary Procedure
- Equality Diversity and Inclusion Policy
- Global Media Engagement Policy
- Global Social Media Policy
- Issues Concerns Reporting and Management Policy
- IT and Information Security Policy
- Physical Security Policy
- Safeguarding Policy and Handbook

Anyone to whom this policy applies, who breaches:

- any of the above policies;
- any obligations contained in those policies relating to confidentiality; or
- any applicable laws or regulatory requirements

may be subject to disciplinary action up to and including termination of employment or termination of Your contract for services (to the extent that these policies apply to You).

## **5 Contact**

For any questions about this policy, please contact the Head of Communications and Marketing via [communications@opml.co.uk](mailto:communications@opml.co.uk).

# Brand and Communications Policy

## Document Purpose:

To provide a framework for Oxford Policy Management to:

- manage its marketing, communications, and public relations to strategically engage with its stakeholders
- embed processes which manage OPM's brand, enhance its reputation, and support its strategic goals, vision, mission, and purpose; and
- manage the use of OPM's logos or marks internally and externally when used by others.

It outlines responsibilities in relation to marketing and communications at OPM.

Policy Overview			
Policy Owner	Head of Marketing and Communications		
Applies to	All employees, Directors and anyone representing OPM		
Global or local scope	Global		
Version Number	1.0	<b>Effective from</b>	01.06.2023
Approvals (Dates)	<b>Board</b>		N/A
	<b>Policy Authorisation Committee</b>		25.05.2023
	<b>Other (please state)</b>		N/A