



Policy:	Media & Public Relations Communications		
Department Owner:	Office of the Chief Investment Officer of the Regents		
Policy Owner:	Chief Operating Officer		
Policy Approver:	Chief Investment Officer & Chief of Staff		
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Purpose

Reputation is vital to the University of California's Office of the Chief Investment Officer of the Regents' (OCIO) business success. External communications must be accurate, timely and consistent with company policies and objectives. To ensure these goals are met, the OCIO has established a process to effectively manage interactions with all forms of media and public relations. OCIO employees may be asked to present or prepare papers for publication. These engagements are both supported and encouraged to showcase OCIO's capability and expertise within the team. In these situations, the presenter/author is expected to align to this policy.

1. General Media

OCIO will manage its relations with the media openly and pragmatically and be responsive to legitimate media inquiries in concert with the Media Relations team at the University of California Office of the President.

1.1 Media Calls

Requests for media interviews as well as inquiries or quotes for publication should be directed immediately to the Chief of Staff. Any pertinent information regarding the inquiry should be included – reporter name, publication/program, deadline, and questions. The Chief of Staff will work with Media Relations on an appropriate response. Only designated OCIO or UCOP spokespeople should respond directly to media inquiries.

1.2 News Releases

When OCIO has news it wishes to publicly release, the Chief of Staff shall work with internal stakeholders to develop an appropriate news release. A draft of the release shall be approved by the appropriate parties prior to release, and shall be facilitated by the Chief of Staff.

1.3 Personal Representation in the Media

When responding to media requests related to personal interests or non-work related activities, the employee should make clear that views are personal and not to be attributed to the OCIO.

1.4. Prior Notification to Relevant Parties

Any material external communication should be provided to the Chief of Staff prior to release. Subsequent distribution may include OCIO, Regents, media, etc.

2. OCIO Confirmed Spokespeople

Employees should not speak to the media without prior authorization. Current confirmed spokespeople include:

- Jagdeep Bachher, Chief Investment Officer
- Dianne Klein, Chief of Staff

What to do if contacted by the media directly?

If an OCIO employee is contacted by the media:

- Obtain the name of the person calling, the media outlet and their contact information.
- If possible, ask when their deadline is.

The OCIO employee should relay the information above as soon as possible to the Chief of Staff, who will contact Media Relations to gather more details and schedule a time with a confirmed OCIO spokesperson if warranted.

Scripted Media Responses

There may be instances where an OCIO employee is approached by a member of the media who is looking for immediate comment. The below responses are appropriate for these scenarios:

If the employee IS NOT the appropriate spokesperson:

“I am not the appropriate spokesperson to comment on this topic. If you’re able to provide me with your name and contact information, I can put you in touch with our Media Relations team.”

If the person IS the appropriate spokesperson:

If the person is the appropriate spokesperson and feels comfortable providing comment, he/she should let the Chief of Staff know. At the time of the request, the OCIO employee may use the following response:

“I can reach out to our Media Relations department, or you can contact them directly. If appropriate, they can arrange an interview at a convenient time for both of us.”

3. Public Relations

OCIO employees are encouraged to share their views on behalf of the OCIO with respect to topics about which they have specific expertise or insight. Speaking engagements and preparation of print materials are supported in so far as the additional work does not interfere with day-to-day responsibilities and obligations to the office.

3.1 Formal Presentations / Keynote Speeches

Formal requests to present or speak at conferences or industry events may be accepted with the approval of the employee's managing director and the CIO and/or Chief of Staff. Prior to accepting such a speaking invitation the following guidelines and procedures must be adhered to.

Guidelines

- There must be a clear business benefit for OCIO to warrant an individual's participation as a presenter.
- When a request is received, and if conference participation is warranted, every effort will be made to have the most appropriate and experienced individual(s) attend and deliver the presentation.
- Prior to the conference, the 'presentation' (e.g. PowerPoint deck) must be reviewed and approved by the respective manager and department leader, and then forwarded to the Chief of Staff to ensure consistency of message and brand protocols, and to ensure appropriate recognition of OCIO at the event, as well as, for any post event tracking of media coverage or otherwise.

Procedures

- Employee will discuss the conference presentation opportunity with his/her manager and follow up with an email request for approval to the Chief of Staff:
 - Copy of invitation to present from conference organizer
 - Business benefit to the organization
 - Brief description of the nature of the employee's presentation topic
 - Name of the conference and website (i.e. www.conference2015.com)
 - Location
 - Dates of travel and attendance
 - Anticipated costs to OCIO (i.e. travel & associated fees)
- The requesting employee will forward the email, marked "Approved" by the Chief of Staff, to the Chief Investment Officer.

Upon approval, employee can confirm attendance, book travel (i.e. for those costs not covered by conference organizer), etc. and is obligated to ensure his/her presentation is completed in advance for manager, department head, and Chief of Staff review.

3.2 Print Material for Publication

OCIO employees may pursue publication opportunities with the permission of the employee's managing director or higher supervisor. Prior to the publication of any material where the author is cited as being an employee of OCIO, the print materials must be approved by the organization before release. This is to be coordinated through the Chief of Staff.

Disclaimer

The following disclaimer must be included following the title slide / page in a presentation / publication or otherwise communicated verbally:

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