



## Marketing and Communications Process and Contingency Plan

### 1.0 Overview

To ensure the continuation of Oregon Pacific Bank's marketing and communications processes, this plan outlines current process and procedures and also the steps necessary to maintain or restore key functions, with a particular focus on the Bank's corporate website, client communication channels (social media, email, Google business profiles), and internal communication protocols.

The plan applies to both situations where the Marketing Manager is available to lead communication efforts and when the Marketing Manager is unavailable. It ensures proper coordination of internal and external resources for communication.

### 2.0 Purpose

The purpose of this documentation is to provide a comprehensive strategy for managing internal and external communications. The plan addresses the following key areas:

- General procedures for how communications are managed when the Marketing Manager is available.
- Contingency communication procedures when the Marketing Manager is unavailable.
- Ensuring that all communication channels are promptly and effectively managed during a crisis to minimize disruption, maintain client trust, and safeguard the bank's reputation.

### 3.0 Goals

- Provide a clear contingency plan for communications if the Marketing Manager is unavailable.
- Ensure timely updates to the Bank's website, social media platforms, and employee intranet.
- Facilitate collaboration with relevant departments and third-party agencies.
- Enable staff members to contribute to social media engagement within compliance and brand guidelines.
- Establish accessible channels for internal announcements and information sharing.
- Outline procedures for internal and external communications in any crisis situation.

### 4.0 Scope

This plan applies to all communications-related activities, including:

- Internal communication (employee intranet, team messaging, etc.)
- External communication (website updates, social media, press releases)
- Coordination with third-party vendors (MuzeMarketing, web hosting providers, etc.)
- Both situations where the Marketing Manager is available and scenarios where the Marketing Manager is unavailable.

The plan provides guidelines on how to:

- Maintain communication channels to minimize operational and reputational impacts.
- Coordinate actions with the Executive Team, IT, Compliance, and external partners.
- Set up alternative communication procedures in the absence of the Marketing Manager.

### 5.0 Roles and Responsibilities

## 5.1 Internal Stakeholders

- **Marketing Manager (Primary)**
  - Leads external communication including website updates, social media posts, and public relations.
  - Coordinates with the Executive Team and relevant stakeholders for message approval and strategy.
  - Maintains communication with MuzeMarketing for digital channel support.
- **Executive Team**
  - Oversees overall crisis response.
  - Reviews and approves critical public-facing communications and statements.
  - Activates alternative communication plans if the Marketing Manager is unavailable.
- **IT Department**
  - Ensures continuity of the Bank's technical infrastructure.
  - Coordinates with web hosting providers to restore website services.
  - Works with the Marketing Manager or MuzeMarketing to ensure website updates.
- **Executive Administrative Assistant**
  - Serves as the liaison between the Executive Team and MuzeMarketing if the Marketing Manager is unavailable.
  - Coordinates with MuzeMarketing and ensures necessary approvals.
- **Compliance Officer**
  - Ensures all external communications during a crisis comply with regulatory requirements, particularly those affecting customer communication, legal notices, and press releases.

## 5.2 External Stakeholders: MuzeMarketing

- **Primary Contact:** Stephanie Hanussak, CEO of Muze Marketing
  - **Phone:** Office: (541) 673-5506 | Cell: (541) 391-3116
  - **Email:** Stephanie@muzemarketing.com
  - **Address:** 303 Melrose Road, Roseburg, OR 97471
- **Role:**
  - Authorized to manage all bank social media accounts, website, Google business profiles, and email marketing tools.
  - Access to Business Wire (pending approval) to publish press releases during a crisis.
  - Step in to manage external communication if the Marketing Manager is unavailable or overwhelmed.

## 5.3 MuzeMarketing Approval Levels

- **Independent Approval by MuzeMarketing:**
  - Routine social media posts, minor website content updates, and holiday alerts.
- **Executive Approval Required:**
  - Press releases (Business Wire), crisis communications, and high-impact announcements.

## 5.4 Hierarchy of Communication and Backup Contacts

Since all communication priority levels route through the Marketing Manager, this hierarchy provides a backup structure if the Marketing Manager is unavailable:

1. **Primary Contact:** Marketing Manager
  - Initiates, approves, and coordinates all external and requested internal communications.
2. **First Backup:** Executive Administrative Assistant
  - Coordinates with MuzeMarketing to execute messaging and ensures Executive Team approvals.
3. **Second Backup:** Executive Team
  - Assigns an internal leader (e.g., Compliance Officer or IT Head) if both the Marketing Manager and Executive Assistant are unavailable.

## 6.0 Communication Strategy

In a crisis, prioritizing the right communication channels is essential. The following **Priority Guide** directs staff to which channels to address first, depending on the type of crisis.

Type of Crisis	Priority 1	Priority 2	Priority 3
Service Disruption	Website and Online Banking Alert	Social Media	Email
Branch Closure	Website and Online Banking Alert	Social Media	Email
Urgent Regulatory Update	Email	Website Alert	Social Media
Natural Disaster/Outage	Social Media	Email	Website Alert
Reputational Risk Issues	Email	Website Blog Post	Social Media

### Notes:

- All client communications should also be shared internally with employees via Teams, SharePoint, or email. This ensures clients reaching out to bankers with questions will receive a coordinated response that is on brand.
- Depending on type of crisis response, some channels of communications, such as social media, should be avoided if it is determined the publicity would incur unnecessary reputational damage or pose a security risk.

### 6.1 General Crisis Communication (When Marketing Manager is Available)

1. **Immediate Assessment and Internal Communication**
  - Marketing Manager assesses the situation with the Executive Team and IT.
  - Develop a communication strategy and confirm relevant systems are operational.
2. **Website and Social Media Updates**
  - Ensure timely updates to the website and social media.
  - If the website is down, use alternative methods like email or social media.
3. **Coordination with MuzeMarketing**
  - Engage MuzeMarketing as needed to manage digital communications.
  - Coordinate messaging with the Executive Team and Compliance.

### 6.2 Contingency Plan (When Marketing Manager is Unavailable)

1. **Immediate Activation of MuzeMarketing**
  - Executive Assistant contacts MuzeMarketing to take over external communications.
2. **Website and Digital Channel Management**
  - MuzeMarketing updates the Bank's website and social media as appropriate with approved messages.
3. **Internal Communication Procedures**
  - If internal networks are down, activate a manual communication chain using team leaders and mobile phones.

## 7.0 Internal and External Dependencies

### Internal Dependencies

- **IT Department:** Manages website and communication tools.
- **Compliance Department:** Ensures regulatory compliance.

### External Dependencies

- **MuzeMarketing:** Manages external communication in case of crisis or high communication volume.
- **Web Hosting Providers:** IT coordinates with them for website recovery.

### 7.1 Expanded Offline Communication Strategy

In the event digital tools are inaccessible:

- **Designate Offline Coordinators:** Assign team leaders for phone-based communication.
- **Pre-set Group Texts:** Set up group text messages for branch leaders.
- **Emergency Contact List:** Maintain a secure, regularly updated offline contact list.

## 8.0 Areas of Improvement

- **Website Failover Testing:** Develop and test a failover plan.
- **MuzeMarketing's Integration:** Define activation triggers and approval levels.
- **Offline Communication Plan:** Update team leader contact lists.
- **Crisis Team Training:** Schedule regular training and post-test reviews.
- **Crisis Communications Team:** Set up internal Teams channel for crisis communications with relevant stakeholders.

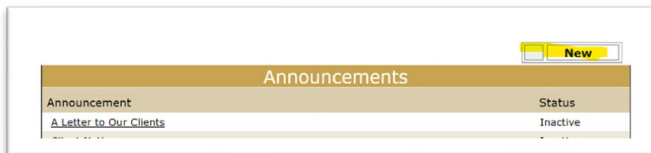
## Addendum 1: Adding an alert banner to Online/Mobile Banking via Teleweb Admin

1. Login to Teleweb at: <https://www.telepc.net/administrator/Default.aspx>
2. Under the **Bank** dropdown menu on the GoBanking Administrator home page, the three items that will allow communication/notices to Bank clients are **Notices**, **Page Text**, and **Rotator Ads**



### a. Notices

Notices are best for Online/Mobile Banking updates and service issues. To add a new Notice, go to the **Announcements** section and select **New**.



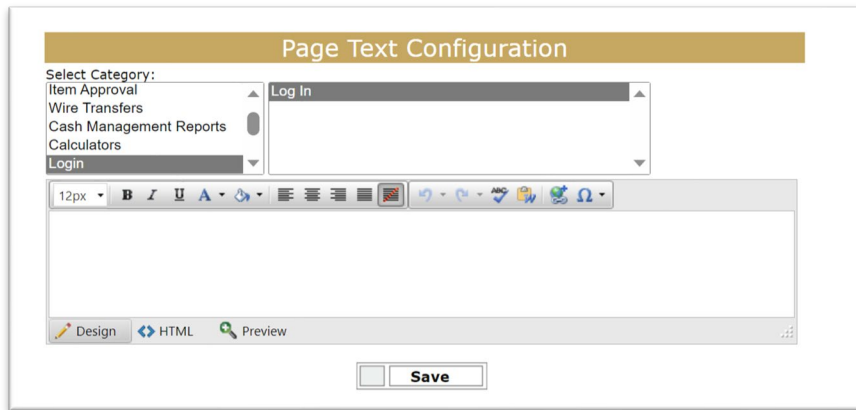
- In the **New Announcement** window, enter all relevant information.
- **Enabled “True”** means the announcement will be live once you hit **Submit**.
- It is recommended to **Schedule** the announcement, so it does not run indefinitely.
- Be sure to select the appropriate platforms the notice should appear on (Internet Banking, iPhone App, etc.).
- Display Options should be examined thoughtfully to minimize customer interruption. **Once Per Customer** or **Once per Login Until Acknowledged** are recommended.
- Once you **Submit** a new announcement, it is recommended that the user login to an active Online Banking account with OPB to view the announcement for accuracy. Based on the importance of the notice, an internal notification via Teams may also be appropriate to ensure communication consistency.

### b. Page Text

Custom page text can be added to display on any of the pages listed in the **Select Category** section. Some categories have multiple pages to select from in the right-hand column.

Once the page that you want to add text to is selected, add the desired text within the body, and hit **Save**. A font from the Arial/Helvetica/Segoe UI family should be selected (sans-serif), as Effra is not available within Teleweb.

It is important to preview the text once completed. User submitting the page text should login to an active Online Banking account and navigate to the page the text was configured for to review it for accuracy.



### c. Rotator Ads

Ads		New Ad
<b>Top Left</b>		
Ad Name	Status	
Oregon Pacific Bank	Active	
✕ 208.Non.Transparent.Logo	Inactive	
<b>Top Right</b>		
Ad Name	Status	
Benks Never Ask That	Active	
+	Digital Assistant	Active
<b>Transfers Menu</b>		
Ad Name	Status	
external.transfers	Active	
<b>Text Banking Menu</b>		
Ad Name	Status	
Mobile Banking	Active	
<b>Redesign Logo</b>		
Name	Status	
+	208.Non.Transparent.Logo	Active
+	208.Non.Transparent.Logo	Active
✕	OPB.Logo	Inactive
<b>Navigation Backgrounds</b>		
Name	Status	
208.Navigation.Background	Active	
<b>Mobile Ads</b>		
<b>Mobile Top</b>		
Name	Status	
Digital Assistant Mobile	Active	

Rotator Ads are used to display visual graphics within Online and Mobile Banking. It is rare to use this method for notification, as rotator ads are mainly used for advertising purposes such as new products, general cybersecurity awareness, or cross-promotion (trust services, for example).

Rotator ads that can be altered include **Top Right** under **Ads** and **Mobile Top** under **Mobile**. Ad Name is required for identification purposes on the back end, and an active link may be selected, which will take the client to the linked page if the banner ad is clicked.

It is important to pay attention to the ad size depending on where it will be displayed. **728 x 90px for Top Banner** within **Online Banking** and **320 x 50px for Top banner** withing **Mobile Banking**. Ads of incorrect size will display distorted, which is not in line with OPB branding standards.

Create New Ad			
*Name:	<input type="text"/>	*Position:	Top Right <input type="button" value="v"/>
*Upload Image:	<input type="button" value="Choose File"/> No file chosen	<input checked="" type="checkbox"/>	Active
URL:	<input type="text"/>	<input type="checkbox"/>	Exit Notice
*Description:	<input type="text"/>		
Recommended banner size is 728 x 90 pixels for the top banner 320x50 for menu ads and the mobile top banner  Acceptable File Types: PNG, JPG, or GIF			
<input type="button" value="Submit"/>		<input type="button" value="Cancel"/>	

If a rotator ad is needed and the Marketing Manager is unavailable, the Bank's third-party ad agency can be contacted to assist with graphics as needed, as the majority of OPB employees do not have access to the necessary design software.

## Addendum 2: Publication of Local Press Releases

<b>FLORENCE</b>	<b>TYPE</b>	<b>CONTACT</b>	
Coast Broadcasting	Radio	news@kcst.com	<a href="https://kcfmradio.com/submit-news/">https://kcfmradio.com/submit-news/</a>
The Siuslaw News	Newspaper	pressreleases@thesiuslawnews.com	<a href="https://thesiuslawnews.com/article/how-to-submit-a-press-release">https://thesiuslawnews.com/article/how-to-submit-a-press-release</a>

<b>EUGENE</b>	<b>TYPE</b>	<b>CONTACT</b>	
The Register Guard - Public Notice	Newspaper	Self-service Portal	<a href="https://www.registerguard.com/public-notice">https://www.registerguard.com/public-notice</a>
The Register Guard – General Releases	Newspaper	n/a	<a href="https://www.registerguard.com/contact/staff/">https://www.registerguard.com/contact/staff/</a>
BiCoastal Media	Radio	n/a	<a href="https://bicoastal.media/contact-us/">https://bicoastal.media/contact-us/</a>

<b>COOS BAY</b>	<b>TYPE</b>	<b>CONTACT</b>	
The World Link	Newspaper	Self-service Portal	<a href="https://theworldlink.com/forms/contact/submit_a_news_tip/">https://theworldlink.com/forms/contact/submit_a_news_tip/</a>
BiCoastal Media	Radio	n/a	<a href="https://bicoastal.media/contact-us/">https://bicoastal.media/contact-us/</a>

<b>ROSEBURG</b>	<b>TYPE</b>	<b>CONTACT</b>	
The News Review	Newspaper	newsdesk@nrtoday.com	<a href="https://www.nrtoday.com/site/contact.html">https://www.nrtoday.com/site/contact.html</a>
BiCoastal Media	Radio	n/a	<a href="https://bicoastal.media/contact-us/">https://bicoastal.media/contact-us/</a>

<b>MEDFORD</b>	<b>TYPE</b>	<b>CONTACT</b>	
Rogue Valley Times	Newspaper	news@rv-times.com	<a href="https://www.rv-times.com/site/contact.html">https://www.rv-times.com/site/contact.html</a>
BiCoastal Media	Radio	n/a	<a href="https://bicoastal.media/contact-us/">https://bicoastal.media/contact-us/</a>

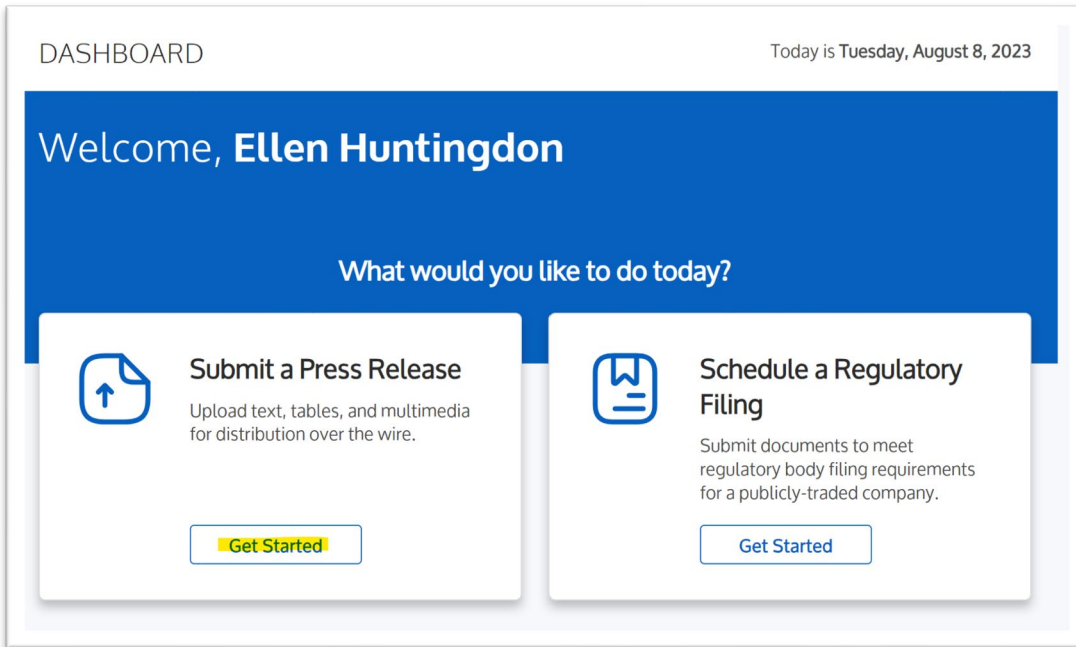
<b>PORTLAND</b>	<b>TYPE</b>	<b>CONTACT</b>	
Portland Business Journal	Newspaper	Self-service Portal	<a href="https://www.bizjournals.com/portland/press-release">https://www.bizjournals.com/portland/press-release</a>
Valley Times	Newspaper	n/a	<a href="https://www.valleytimes.news/site/contact.html">https://www.valleytimes.news/site/contact.html</a>
Oregon Business	Newspaper	editor@oregonbusiness.com	
The Oregonian	Newspaper	newsroom@oregonian.com	

A list of additional Oregon media outlets can be found on the Oregon Secretary of State Website: <https://sos.oregon.gov/blue-book/Pages/cultural/media.aspx>

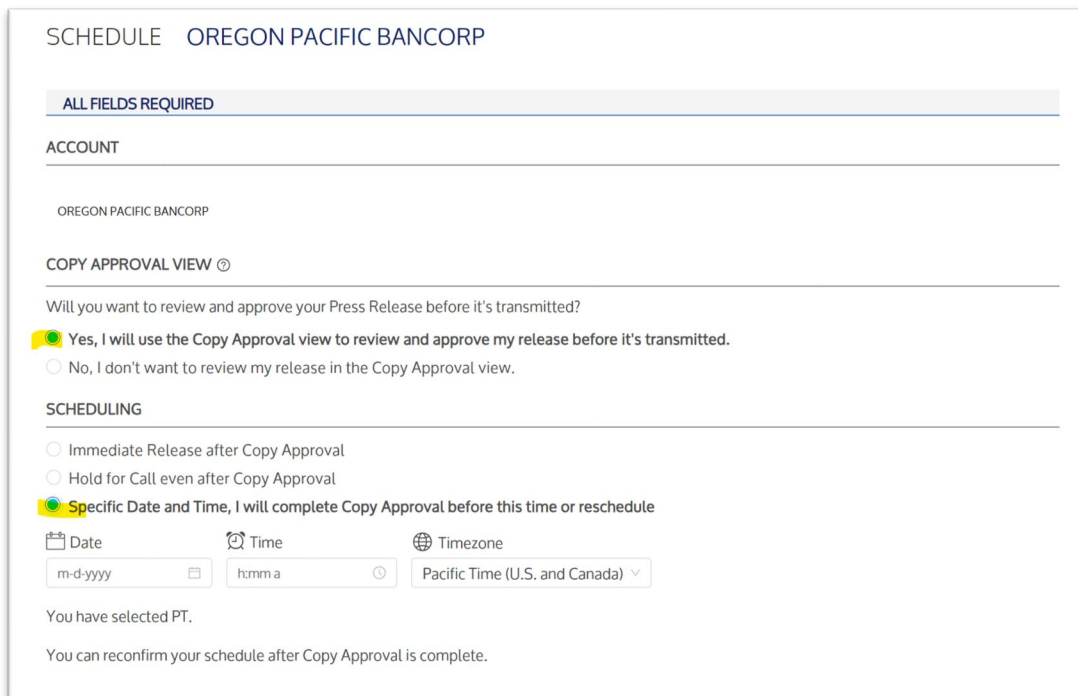


## Addendum 3: Business Wire Contact and Release Instructions

1. Authorized users' login via: <https://go.businesswire.com/>
2. Within the Business Wire Dashboard, select **Get Started** under Submit a Press Release.



3. Keep the default setting of using **Copy Approval** to review the release prior to distribution and select **Specific Date and Time**. \*Note, this means once you approve copy, it will be distributed at the scheduled time. Releases should always be scheduled to go out **AFTER** market close (3pm EST / 1pm PST)



The screenshot shows the "SCHEDULE" form for "OREGON PACIFIC BANCORP". The form has a header "SCHEDULE OREGON PACIFIC BANCORP" and a sub-header "ALL FIELDS REQUIRED". The "ACCOUNT" section shows "OREGON PACIFIC BANCORP". The "COPY APPROVAL VIEW" section asks "Will you want to review and approve your Press Release before it's transmitted?" and has two radio button options: "Yes, I will use the Copy Approval view to review and approve my release before it's transmitted." (selected) and "No, I don't want to review my release in the Copy Approval view." The "SCHEDULING" section has three radio button options: "Immediate Release after Copy Approval", "Hold for Call even after Copy Approval", and "Specific Date and Time, I will complete Copy Approval before this time or reschedule" (selected). Below these are three input fields: "Date" (m-d-yyyy), "Time" (h:mm a), and "Timezone" (Pacific Time (U.S. and Canada)). The form also includes the text "You have selected PT." and "You can reconfirm your schedule after Copy Approval is complete."

4. When prompted to select distribution, select the saved distribution list titled **Pacific Northwest**, and continue.

[Schedule](#) — [Distribution](#) — **[Distribution Cart](#)** — [4 Files](#) — [5 Details](#) — [6 Summary](#)

## DISTRIBUTION CART OREGON PACIFIC BANCORP

[+ Add or remove circuits and other destinations](#)

**CURRENT SELECTIONS**

GLOBAL-MOBILE-SOCIAL-MEASURABLE	<p><b>Global-Mobile-Social-Measurable</b> ⓘ Included with English-language distributions. \$110 (USD)</p>	
	<p><b>Pacific Northwest</b> ⓘ First 400 words \$400 (USD) Each additional 100 words or any fraction thereof \$125 (USD)</p>	-
	<p><b>Communications: Public Relations/Investor Relations</b> ⓘ \$0 (USD)</p>	-
UNITED STATES	<p><b>Professional Services: Banking</b> ⓘ \$0 (USD)</p>	-
	<p><b>Professional Services: Finance</b> ⓘ \$0 (USD)</p>	-
	<p><b>Professional Services: Small Business</b> ⓘ \$0 (USD)</p>	-

[+ Save This Distribution](#)

5. In the Files section, you will need to update the content of the release.
  - a. Under **Text and Tables**, the copy of the release will need to be uploaded as an editable word document. For financial tables, you will need to upload an excel version. Please note that they will NOT take PDF versions, as the editors will be unable to format the content appropriately. Under
  - b. **Logo**, please upload a high-resolution copy of the Bank's logo, which can be found on Insight's Marketing page.
  - c. **Media/Interactive Media** is normally skipped unless additional photos or videos are required.

[Schedule](#) — [Distribution](#) — [Distribution Cart](#) — **4 Files** — [5 Details](#) — [6 Summary](#)

## FILES OREGON PACIFIC BANCORP

**\*Required Fields**

**\*Text & Tables** ⓘ

Add release text and financial tables for our editors to format.

[+ Add File](#)

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**Logo** ⓘ

Show the world who you are. One logo is complimentary with your order.

[+ Add Logo](#)

[Select from media library ▶](#)

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**Media** ⓘ

Round out your press release by including rich media content such as photos, videos, audio, documents and slideshows. For maximum reach, don't forget to add a caption.

[+ Add Media](#)

[Select from media library ▶](#)

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**Premium - 2 days**

**Interactive Media** ⓘ

Take your news to another level. Add engagement to your brand story with Business Wire Interactive Media. Explore what is possible and learn how interactivity adds interest and drives action.

[+ Start Interactive Media Project](#)

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[QUIT](#)
August 8, 2023 7:47 PM PT
[CHECK & CONTINUE →](#)

6. Check all details and required fields. The default information can all be kept as is, but **Contact Info** should be updated to the individual submitting the release, in case there are any questions.

[Schedule](#) — [Distribution](#) — [Distribution Cart](#) — [Files](#) — **Details** — [6 Summary](#)

## DETAILS OREGON PACIFIC BANCORP

**\*Required Fields**

Release Information	Empty - Optional	<a href="#">EDIT</a> ▼
*Contact Info for Business Wire Newsroom	✓ Completed	<a href="#">EDIT</a> ▼
Social Media on Businesswire.com ⓘ	✓ Completed	<a href="#">EDIT</a> ▼
Company Exchange Info	✓ Completed	<a href="#">EDIT</a> ▼

7. You will be asked to carefully review your order and confirm it for accuracy before submitting. Once you have carefully reviewed your release, click **"I Accept"** and **Submit**.

Prior to submitting your documents, please carefully review your order for accuracy. If you are unsure or unclear about the proper services to select, please contact a Business Wire representative immediately.

By checking the "I Accept" checkbox below, and submitting your documents, you represent that you are duly authorized to submit this order for Company identified by Account Information above, that you have read and agree to Business Wire's Membership Agreement Terms and Conditions, and that you accept responsibility for the services being ordered.

Once distributed, all circuit orders will be billed as ordered.

I Accept

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August 8, 2023 7:54 PM PT  →

8. Once you have submitted your release, Business Wire's editors will format it and message the submitter when copy is ready for approval. You will be prompted to open a copy of the release, review all information, and Approve All. Only after approving all information will the release be submitted at the scheduled time.