SBI Foundation Communications and Visibility Policy for Partners

For NGO Partners & Implementing Agencies

Version 2.0 | FY 2026-27

Marketing & Communications (MarCom) | SBI Foundation

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1. Purpose & Scope

SBI Foundation is committed to communicating the impact of its work with clarity, authenticity, and consistency. These guidelines have been developed to ensure that all NGO partners and implementing agencies funded by SBI Foundation represent the Foundation accurately, protect the dignity of beneficiaries, and support SBIF's institutional visibility goals.

These guidelines apply to all organisations that have entered into a grant agreement with SBI Foundation. Compliance is a condition of the grant and is monitored through the quarterly reporting process.

These guidelines are to be read alongside the SBIF Official Consent for Photography, Videography & Digital Usage (Appendix F) and the SBIF Official Withdrawal of Consent (Appendix G), which together form SBIF's Consent and Data Protection Framework in compliance with the Digital Personal Data Protection Act, 2023 (DPDPA, 2023).

How this document is structured: Sections 1-4 explain who MarCom is and how to work with them. Sections 5-12 cover content and compliance standards. Section 13 sets out what SBIF commits to you. Sections 14-15 cover reporting and escalation. Appendices A-H are working tools to use day to day.

1.1 MarCom: SBIF's Single Communications Function

The Marketing & Communications (MarCom) team at SBI Foundation is the sole institutional function responsible for all communications activities. Every visibility activity, content creation, event coverage, programme launches, social media, press releases, publications, branding, collateral, awards, and digital communications, is owned and managed by the MarCom team.

No communications activity related to an SBIF-funded project may be initiated, published, or distributed without MarCom's knowledge and approval. This applies to NGO partners, implementing agencies, and SBIF programme teams equally.

1.2 What MarCom Manages

Function	What it covers
Corporate Communications & PR	**Press releases, media relations, spokesperson management, media queries, earned coverage**
Content & Writing	Case stories, blogs, publications, editorial copy, annual report, newsletter, magazine
Design & Branding	Collateral, standees, banners, logo compliance, event branding, visual identity, vehicle branding
Digital & Social Media	Social media management, content calendar, ORM, website, digital campaigns, paid posts
Events & Launches	Event communications, pre-event collateral, on-ground branding, post-event coverage
Awards & Recognition	Award identification, submission management, win amplification
Governance & Approvals	Final sign-off on all communications, strategy, escalations, consent and data compliance

1.3 How to Reach MarCom: One Contact Point

All requests, submissions, and queries must be directed to:

communications@sbifoundation.co.in

This is SBIF's official communications address. It is not a personal inbox. It is the formal channel for all communications-related matters across the MarCom function. MarCom assigns each request internally to the appropriate team member.

> **Important: All requests must come through the routing hierarchy in Section 1.4 and be submitted to communications@sbifoundation.co.in. You can contact individual MarCom team members directly once the intricudion is done.**

1.4 Routing Hierarchy

All communications requests from NGO partners and implementing agencies follow a two-level structure. This ensures every request is contextualised and verified by the programme team before reaching MarCom.

Level	Who	Role
1	**Partner NGO's Communications POC + SBIF Programme POC (Assistant Manager) + SBIF Programme Head**	**The NGO's designated communications contact works with SBIF's programme team to compile, verify, and submit all communications requests. The programme team provides context, validates data, and approves the submission before it reaches MarCom.**
2		MarCom receives the request through communications@sbifoundation.co.in, assigns it to the relevant function internally, and manages all production, approvals, and publication.

Rule: MarCom does not accept requests directly from NGO partners without the SBIF Programme POC in copy. Every submission must include the Programme POC.

1.5 MarCom Onboarding Meeting

Once a new project is formally established, the SBIF Programme Team will arrange an introductory meeting between the partner organisation and the SBIF MarCom team.

This meeting will:

- Introduce the MarCom team and explain the functions each member covers.
- Walk the partner through these guidelines and confirm understanding of the routing hierarchy.
- Establish the partner's designated Communications POC.
- Set up the shared OneDrive folder and communication channel.
- Agree on the first content submission timeline and a project-level visibility plan.

Timeline: This meeting must take place within 30 days of the grant letter being signed.

2. Communication Setup

2.1 Designate a Communications POC

- **Establish a designated Communications POC** from your organisation within 15 days of receiving this document. Share the name, designation, email address, and phone number with your SBIF Programme POC, who will formally introduce you to the MarCom team at the onboarding meeting (Section 1.5).
- The Communications POC is responsible for all media, content, and visibility-related interactions with SBIF.
- In the event of a change in POC, inform SBIF MarCom within 5 working days and ensure a proper handover.

2.2 Shared Content Folder

- SBIF will create a designated shared folder on OneDrive for each partner organisation within 1 week of onboarding. The SBIF MarCom team will share access and usage instructions with your Communications POC.
- **Folder structure:** Main Partner Folder > FY-Year > Event Type > Event Date
- **WhatsApp submissions will not be accepted.** WhatsApp compresses file quality below the minimum resolution requirement. Use the OneDrive folder or email.

2.3 Communication Channel

- A WhatsApp Business group or Microsoft Teams channel will be set up for real-time coordination between the partner's communications team, the SBIF MarCom team, and the designated Programme POC.
- This channel is for coordination and quick updates only. All official submissions must go through the shared folder and email.

3. Social Media Presence & Content

3.1 Platforms

Platform	Primary Audience	Content Focus
LinkedIn	**Professionals, donors, sector peers, government**	**Impact reports, milestones, op-eds, programme updates**
Instagram	Youth, NGO community, general public	Reels, impact stories, events, behind-the-scenes
Facebook	Communities, NGO partners, families	Events, announcements, longer posts, community content
YouTube	All audiences	Long-form impact films, programme documentaries
YouTube Shorts	Youth, general public	Short-form clips under 60 seconds
WhatsApp Channels	Field communities, beneficiary families	Programme updates, regional language outreach
Threads	Professionals, media, sector peers	Quick updates, sector commentary, campaign moments
X (formerly Twitter)	Media, policy stakeholders	Advocacy, real-time events (secondary priority)

3.2 Posting Frequency

- **Minimum (compliance floor):** 2 posts per month. Falling below this consistently will be flagged in the Quarterly Visibility Report.
- **Recommended:** 2 posts per week across primary platforms (Instagram + LinkedIn at minimum). This reflects current algorithm realities, posting less than twice a week significantly reduces content visibility.
- Posts should be spaced throughout the month, not clustered.

3.3 Tagging & Attribution

- Always tag SBI Foundation's official handles when posting content related to SBIF-funded projects.
- Use the correct attribution format in all captions: "SBI Foundation's 'Project Name' implemented by 'Partner Name'..."
- Do not tag SBI Foundation in posts unrelated to SBIF-funded projects.
- Posts involving quotes from SBIF Management must be approved by SBIF MarCom before posting.

3.4 Short-Form Video (Reels & Shorts)

- **Duration:** 30 to 60 seconds for Instagram Reels and YouTube Shorts.
- **Story structure:** Open with the human moment (5 seconds). State the problem (10 seconds). Show the intervention (25 seconds). Close with impact in numbers or a direct beneficiary statement (15 seconds).
- **Always add subtitles or text overlays:** most users watch without sound.
- **Aspect ratios:** 9:16 vertical for Reels and Stories. 16:9 for YouTube and Facebook video. 1:1 for LinkedIn and Facebook feed posts.
- Include SBI Foundation and partner logos at start and end of all videos.

4. External Communications

4.1 Press Releases

- All draft press releases must be submitted to communications@sbifoundation.co.in with the SBIF Programme POC in CC.
- **Review timeline:** Allow a minimum of 5 working days for SBIF review.
- All quotes attributed to SBIF Management must be approved in writing before inclusion.

4.2 Awards & Recognition

- **Advance notice:** At least 15 working days before any award submission deadline.

- SBI Foundation must be prominently acknowledged as the funding partner in all award submissions, presentations, and acceptance communications.
- Correct attribution format: "SBI Foundation's 'Project Name' implemented by 'Partner Name'".

4.3 Conferences, Panels & Webinars

- Notify SBIF at least one week before any conference, panel, podcast, or webinar that draws on SBIF-funded work.
- Any presentation, paper, or speaking notes that reference SBIF-funded work must acknowledge SBI Foundation as the funding partner.
- If SBIF participation is required, notify at least 2 weeks in advance.

4.4 Key Events & Milestone Activities

- **Planned milestone events:** At least one month's advance notice. See Appendix E for the definition of what constitutes a milestone event.
- **All other programme events:** At least one week's advance notice.
- Event photographs and video footage must be shared with SBIF within 7 working days of the event.
- SBIF branding must be prominently displayed at all funded project events (Section 6).

5. Success & Impact Stories

5.1 Submission Requirement

- **Minimum:** 1 to 2 stories per month in written, photo, or video format.
- Use the Beneficiary Case Story Structure in Appendix A.
- **Written submissions:** Submit a detailed version (300-500 words) AND a short social media summary (100-150 words) together.
- All impact numbers must be verified by the programme team before submission.

5.2 Language Accessibility

- Submit stories in English where possible. If your field team works primarily in a regional language, submit in that language and note the language, SBIF MarCom will arrange translation.
- If you need a summary of these guidelines in a regional language, contact your SBIF Programme POC.

> **Quality over length: A 200-word story you know intimately is more valuable to SBIF than a 500-word story produced quickly. Do not mistake length for quality. Submissions that are long but generic, or that could apply to any programme anywhere in India, will be returned for revision.**

6. Branding Standards

- Display the SBI Foundation logo and the tagline "Supported by SBI Foundation" on all programme materials, standees, banners, certificates, beneficiary ID cards, event backdrops, and digital creatives.
- Use only approved logo files provided by SBIF MarCom. Do not recreate, recolour, distort, or modify the logo in any way.
- The SBIF logo must not be smaller than the partner organisation's logo on any co-branded material.
- All branded collateral must be approved by SBIF MarCom before production or publication.
- Field staff participating in project events should wear branded merchandise (T-shirts, caps) featuring both the SBI Foundation and partner logos where possible. Designs must be approved by SBIF MarCom before production.

Branding approvals: Submit all collateral to communications@sbifoundation.co.in with the SBIF Programme POC in CC. Allow at least 5 working days for review.

7. Photograph Guidelines

- **Resolution:** Minimum 1080 pixels on the shortest side. Submit as high-quality JPG. Not compressed, not screenshots.
- **Composition:** Follow the rule of thirds. Capture real moments and human connection. Avoid purely ceremonial or staged group photographs as your only submission.
- **Quantity:** Submit a minimum of 10 curated images per event. Do not submit every photograph taken, curate before submitting.
- **Context:** Include a 5W1H caption for every submission (Who, What, Where, When, Why, How).
- **Submission:** Upload to the SBIF OneDrive folder. WhatsApp submissions will not be accepted.

8. Video Guidelines

- **Resolution:** Minimum 1080p (Full HD). Format: MP4 or MOV only.
- **Duration:** 1-3 minutes for social media. 3-5 minutes for impact documentaries. Under 60 seconds for Reels and Shorts.
- **Orientation:** 9:16 for Reels and Stories. 16:9 for YouTube and Facebook.
- **Audio:** Clear audio with minimal background noise. Add subtitles wherever possible.
- **Branding:** Include SBI Foundation and partner logos at the beginning and end of all videos.

9. Legal, Consent & Data Protection (DPDPA, 2023)

SBI Foundation's consent and data protection framework is governed by the Digital Personal Data Protection Act, 2023 (DPDPA, 2023). The two official SBIF legal instruments are provided in full in Appendix F (Consent Form) and Appendix G (Withdrawal of Consent Form). These are the only valid consent documents for SBIF-funded projects.

9.1 Obtaining Consent

- Informed consent must be obtained from every individual photographed or filmed before capturing their image or recording their voice.
- For minors (under 18 years), written consent from a parent or legal guardian is mandatory.
- **Use only the official SBIF Consent Form (Appendix F).** Do not use any other form.
- Digital consent, via recorded verbal consent or electronic signature, is acceptable where paper forms are not practical. This must be documented by the NGO representative.
- Consent grants SBIF and the implementing partner rights for 10 years worldwide, unless withdrawn earlier.

9.2 Data Storage & Retention

- Completed consent forms must be stored securely and made available to SBIF upon request.
- **Retention period:** 10 years from the date of consent, or as required under applicable law, whichever is longer.
- Personal data must be used only for the purposes stated at time of collection (purpose limitation, DPDPA, 2023).
- Only information necessary for the stated purposes may be collected and retained (data minimisation, DPDPA, 2023).
- SBI Foundation acts as the Data Fiduciary under the DPDPA, 2023 for personal data collected through its consent forms.

9.3 Withdrawal of Consent

- **Use only the official SBIF Withdrawal of Consent Form (Appendix G).** Do not accept informal withdrawal requests.
- Withdrawal applies prospectively only. Content already published or in the process of being printed or distributed is subject to a grace period (In-Progress Content provision, see Appendix G for full detail).
- SBIF will endeavour to cease further use of relevant content within 30 days of receiving a completed Withdrawal Form.
- **All withdrawal requests must go to:** cm.hr@sbifoundation.co.in (Grievance Officer), not through the MarCom team.
- Minors have the right to withdraw consent independently upon turning 18 years of age.

9.4 Who to Contact for What

Content, branding, social media, press releases, approvals: communications@sbifoundation.co.in
Consent, withdrawal requests, data protection grievances: cm.hr@sbifoundation.co.in (Chief Manager HR & Admin)

9.5 Ethical Image Policy

- Images must portray subjects with dignity and respect. Avoid exploitative, sensationalistic, or stereotyping imagery.
- Children's faces should not be prominently featured in public communications without guardian consent and programme head approval.
- Partners are strongly encouraged to develop an internal Ethical Image Policy. Reference frameworks: WaterAid, Oxfam, Gram Vikas, UN Women.

10. AI-Generated Content Policy

10.1 Disclosure

- Declare use of AI tools in your submission email. State what the tool was used for (writing, translation, image editing, etc.).
- SBIF will not reject content solely because AI tools were used, but authenticity and accuracy will be checked more closely.

10.2 Prohibited Uses

- **AI-generated images of beneficiaries:** strictly prohibited. All images of real people and field activities must be authentic photographs with proper consent.
- **AI-generated quotes:** prohibited. Never attribute AI-generated text to a real beneficiary, staff member, or SBIF representative.
- **AI-generated statistics:** prohibited when presented as verified programme data.

10.3 Acceptable Uses

- Writing assistance for drafts, provided factual accuracy is verified by the partner's team before submission.
- Translation or transcription of regional language content.
- Editing tools for image brightness, colour correction, or video stabilisation, provided no content is fabricated.

10.4 Quality Standard for All Submitted Content

This standard applies whether or not AI tools were used.

- **Stand behind every word.** Any content submitted to SBIF must be something the submitting organisation can fully stand behind. If SBIF asks why a particular sentence was written, what data supports a claim, or who the beneficiary in a story is, the partner must be able to answer from their own direct knowledge.
- **Authenticity over polish.** SBIF is not the editor of your content. A submission that reads smoothly but does not reflect real knowledge of the programme or the people in it will be returned

regardless of technical quality.

- **Shorter and specific beats longer and generic.** If it took two minutes to generate a submission and it takes SBIF twenty minutes to review and rewrite it, that is a transfer of work, not a submission.
- **Marking AI output as a starting point is acceptable.** Flag it clearly as "AI-assisted draft, please review with us" and SBIF will treat it as a starting point rather than rejecting it outright.

> **SBIF reserves the right to reject any content that cannot be verified as authentic or that appears to have been fabricated using AI tools.**

11. Research, Publications & Public Appearances

This section applies to academic institutions and research-focused implementing agencies such as IITs, IIMs, universities, and research organisations.

- Every research paper or publication receiving financial support from SBI Foundation must include a dedicated funding acknowledgement: "This work was supported by SBI Foundation under the [Programme/Grant Name]."
- Any conference presentation, podcast, webinar, or panel that draws on SBIF-funded work must acknowledge SBI Foundation as the funding partner.
- Notify SBIF MarCom at least one week before any such public appearance.
- Presentation materials and speaking notes that reference SBIF-funded work should be shared with SBIF MarCom before the event.
- Co-authorship arrangements involving SBIF personnel must be agreed upon in writing before paper submission.

12. Crisis Communications Protocol

12.1 What Constitutes a Crisis

Activate the crisis protocol immediately if any of the following occur:

- A social media post related to the project receives disproportionate negative engagement, 50 or more negative comments or shares within 12 hours.
- A journalist or media outlet contacts anyone at the partner organisation or SBIF about the project.
- A formal complaint from a beneficiary or community member is made publicly on any platform.
- A post by a staff member, volunteer, or field worker misrepresents the programme or SBI Foundation.
- A serious field incident involving project beneficiaries, staff, or assets occurs.
- Any regulatory, legal, or government communication is received relating to the project.

12.2 Four-Step Response

Step	Action	What to do
1	**Pause all posting**	**Stop all scheduled and live social media posts immediately. Do not post anything related to the project until SBIF has approved a response.**
2	Notify SBIF within 2 hours	Email communications@sbifoundation.co.in and the Programme Head with: what happened, where, when, who is involved, what has been said publicly, and any screenshots or links.
3	Do not respond publicly	Do not issue any statement, comment, or response on any platform without written approval from SBIF MarCom.
4	Follow approved response	Execute the agreed response exactly as approved. Document all actions taken and report back to SBIF within 24 hours.

13. What SBIF Commits to You

These guidelines set out what SBIF expects from its partners. It is equally important that partners know what SBIF commits to in return. This section sets out SBIF's obligations in the communications partnership.

13.1 Response Times

Request type	SBIF MarCom response commitment
Content submission (case story, photo, video)	**Acknowledgement within 2 working days. Feedback or approval within 7 working days.**
Branding and collateral review	Feedback within 5 working days.
Press release review	Feedback within 5 working days.
Award submission review	Feedback within 5 working days of submission.
Crisis communications support	Initial response within 2 hours of notification.
General queries to communications@sbifoundation.co.in	Response within 3 working days.

13.2 Credit and Attribution

- When SBIF publishes content featuring your programme, your organisation will be credited in the post or publication using the standard attribution format: "SBI Foundation's 'Project Name'

implemented by 'Partner Name'".

- When SBIF uses a beneficiary story or photograph originating from your submission, the post or publication will acknowledge the programme and partner.
- SBIF will not publish your beneficiaries' content for commercial or unrelated purposes.

13.3 How SBIF Uses Your Content

- Content submitted by partners is used by SBIF for: social media posts, annual reports, newsletters, donor communications, grant applications, presentations, events, and publications related to SBIF's work.
- SBIF will not use your content to promote a product, commercial service, or any cause unrelated to SBI Foundation's programme objectives.
- SBIF will always portray beneficiaries and communities with dignity and in accordance with the ethical standards set out in Section 9.5.

13.4 Capacity Support

- SBIF MarCom will provide an orientation session on these guidelines at the start of every new project engagement.
- Bi-monthly feedback sessions will be conducted to review content quality and provide practical guidance on improvement.
- If your team needs guidance on photography, story writing, or video production, contact communications@sbifoundation.co.in and the MarCom team will advise.

13.5 Feedback from Partners

- SBIF welcomes feedback from partner organisations on these guidelines and on the communications working relationship.
- If you have concerns about how SBIF has used your content or about any aspect of the communications process, raise it first with your SBIF Programme POC. If unresolved, write to communications@sbifoundation.co.in.
- These guidelines are reviewed annually. Partner feedback is considered in each review cycle.

14. Feedback, Reporting & Visibility Scorecard

14.1 Bi-Monthly Feedback Sessions

- SBIF MarCom will conduct feedback sessions with each partner's Communications POC every two months.
- Sessions cover: content quality, social media engagement, branding compliance, outstanding submissions, and planning for the upcoming period.
- After each session, a brief capacity-building discussion will be held on areas of improvement.

14.2 Quarterly Visibility Report

- Partners must include a Visibility Report as part of each Quarterly Progress Report (QPR).
- The Visibility Report must document: case stories submitted, social media posts published, event photographs shared, press releases vetted, awards notified, and consent forms maintained.

14.3 Partner Visibility Scorecard

Visibility Activity	Target (per Quarter)	Achieved	Status
Case stories submitted to SBIF	**3 to 6**		
Social media posts tagging SBIF	Minimum 6		
Short-form videos (Reels/Shorts)	Minimum 3		
Event photographs submitted within 7 days	All events		
Branded event materials displayed	All funded events		
Press releases vetted by SBIF before release	All releases		
Award/conference advance notice given	All instances		
Official SBIF consent forms obtained	All media captured		
Visibility Report included in QPR	Every QPR		

15. Non-Compliance & Escalation

Level	Who Acts	When & How
Level 1	**Programme POC (SBIF)**	**First instance. Programme POC raises directly with the partner's Communications POC and documents it.**
Level 2	SBIF MarCom Team	Second instance within the same quarter. Formal written communication to partner and remedial review.
Level 3	Programme Head (SBIF)	Non-compliance unresolved after 30 days. Programme Head contacts NGO leadership.
Level 4	SBIF Management	Persistent non-compliance. Management review. May affect future disbursements or grant renewal.

Visibility compliance is a condition of the grant agreement. Consistent failure to meet these requirements may be considered a breach of grant terms and may affect future disbursements or renewals.

APPENDICES

Appendix A: Beneficiary Case Story Structure

Detailed Case Study (300-500 words)

- **Title:** A compelling headline naming the beneficiary or community and the change achieved.
- **Background:** Who is the beneficiary? Where are they from? What was their situation before the programme?
- **The Challenge:** What specific problem or barrier did they face?
- **The Intervention:** What did the programme do? Be specific.
- **The Outcome:** What changed? Use specific numbers. Include a direct beneficiary quote.
- **Looking Ahead:** What does the future look like for this person or community?
- **Attribution:** "This story is part of SBI Foundation's [Project Name] implemented by [Partner Name]."

Short Summary for Social Media (100-150 words)

- Must include: beneficiary reference, location, at least one impact number, and SBI Foundation attribution.
- Should end with a quote or call to action.

Appendix B: Content Quality Checklist

Photograph Checklist

- [ ] Resolution meets minimum (1080px on shortest side)
- [ ] Image is clear and in focus
- [ ] Adequate natural lighting
- [ ] Captures authentic moment or human connection
- [ ] 5W1H context caption provided
- [ ] Official SBIF consent form obtained and documented
- [ ] SBI Foundation attribution in caption
- [ ] Submitted via OneDrive or email (not WhatsApp)

Video Checklist

- [ ] Resolution minimum 1080p, format MP4 or MOV

- [ ] Correct aspect ratio for intended platform
- [ ] Clear audio; subtitles or text overlays added
- [ ] SBI Foundation and partner logos at start and end
- [ ] Duration appropriate (under 60s for Reels)
- [ ] Official SBIF consent obtained for all individuals

Written Story Checklist

- [ ] Compelling headline
- [ ] Human-centred narrative with direct beneficiary quote
- [ ] At least one specific impact number
- [ ] Correct SBI Foundation attribution
- [ ] Both detailed (300-500 words) and short (100-150 words) versions submitted
- [ ] Factual accuracy verified by programme team

Appendix C: Partner Visibility Scorecard (Quarterly)

To be completed by the partner's Communications POC and submitted with each Quarterly Progress Report.

Partner Organisation: _____

Project Name: _____

Reporting Quarter: _____

Communications POC: _____

Activity	Target	Achieved	Comments
Case stories submitted to SBIF	**3 to 6**		
Social media posts tagging SBIF	6+		
Short-form videos (Reels/Shorts)	3+		
Event photos submitted within 7 days	All events		
Branded materials at all funded events	All events		
Press releases sent to SBIF before release	100%		
Awards/conferences: advance notice given	100%		
Official SBIF consent forms maintained	100% of media		

Self-Assessment: Excellent | Good | Needs Improvement

Key achievements this quarter:

_____

_____

Challenges faced and support needed from SBIF:

_____

_____

Appendix D: Onboarding Email Template

Subject: SBI Foundation Communications and Visibility Policy for Partners 2026 (Version 2.0): Action Required

Dear [Partner Organisation Name] Team,

As part of our partnership, we are sharing the SBI Foundation Communications and Visibility Policy for Partners 2026 (Version 2.0), which set out how we will work together to communicate the impact of our funded projects. These guidelines are compliant with the Digital Personal Data Protection Act, 2023.

Action required from your team:

- Review the guidelines document in full.
- Nominate a Communications POC by [DATE] and share their name, designation, email, and phone number.
- Attend the orientation session on [DATE/TIME] via [PLATFORM].
- Confirm access to your designated OneDrive shared folder.

Documents enclosed:

- SBI Foundation Communications and Visibility Policy for Partners 2026 (Version 2.0)
- Appendix A: Beneficiary Case Story Structure
- Appendix B: Content Quality Checklist
- Appendix C: Partner Visibility Scorecard
- Appendix E: Milestone Event Definition Guide
- Appendix F: SBIF Official Consent for Photography, Videography & Digital Usage
- Appendix G: SBIF Official Withdrawal of Consent
- Appendix H: Partner Acknowledgement of Receipt (please sign and return)

All submissions and queries: communications@sbifoundation.co.in (include your SBIF Programme POC in CC)

Consent and data protection queries: cm.hr@sbifoundation.co.in

We look forward to working together to tell the story of this project and its impact.

Warm regards,

[Name] | Marketing & Communications | SBI Foundation

communications@sbifoundation.co.in

Appendix E: Milestone Event Definition Guide

Section 4.4 requires one month's advance notice for planned milestone events and one week for all other programme events. Use this guide to determine which category your event falls into.

Category	Examples	Notice Required
Planned Milestone Event	**Programme inauguration or launch. Completion ceremony or graduation. Field visit by SBIF MD/CEO or COO. Partnership signing (MoU ceremony). Annual review with government or sectoral bodies. Major donor or media event.**	**1 month minimum**
Standard Programme Event	Monthly training sessions. Regular beneficiary meetings. Field monitoring visits. Internal team reviews. Routine outreach events. Community engagement activities.	1 week minimum
Unplanned/Urgent Event	Emergency response events. Unexpected media coverage requiring an immediate event. Crisis-related community meetings.	As soon as possible. Notify simultaneously with or immediately after the event.

If you are unsure which category your event falls into, contact communications@sbifoundation.co.in. When in doubt, give more notice rather than less.

SBI FOUNDATION

[NAME OF THE PROGRAMME]

CONSENT FOR PHOTOGRAPHY, VIDEOGRAPHY & DIGITAL USAGE

DPDPA, 2023 Compliant | Official SBIF Document: Appendix F

1. Parties and Project Details

I hereby grant SBI Foundation and its parent company, subsidiaries, affiliates, licensees, representatives, and their respective successors and assigns (collectively, "SBIF") and [Name of the NGO], in connection with the [Name of the Project] initiative (the "Initiative"), the right to photograph and record video/film footage of me / my children / my wards, being minors and of whom I am the parent/guardian, including sound recordings of my / our / their voice (such photographs, footage and recordings collectively referred to as "Content").

2. Grant of Rights

The Consenting Party hereby grants SBIF and the Implementing Partner (collectively, "Authorised Parties") the right to photograph and record video/film footage, including audio/sound recordings of any kind. The Consenting Party agrees that SBIF may use the Content for:

- Informational, educational, and promotional materials related to the Programme.
- Institutional and regulatory reporting, including CSR disclosures, annual reports, and donor communications.
- Print media, websites, social media platforms, television, radio, and other current or later developed media.
- Presentations, exhibitions, and public awareness campaigns.
- Stationery or printed materials used for marketing, sale, or distribution.

The Implementing Partner shall not use any content developed by SBIF without obtaining prior written consent of the Consenting Party and SBIF independently.

3. Geographic Scope and Duration

The rights granted herein shall apply worldwide and shall remain in force for a period of ten (10) years from the date of this Consent Form, unless withdrawn earlier in accordance with Section 6 below. The said rights may be extended with the due consent of the Consenting Party.

4. Ownership of Content

Copyright and all intellectual property rights in the Content created by SBI Foundation or its authorised agencies shall vest in SBI Foundation as the first owner. The Consenting Party hereby grants to SBI Foundation an irrevocable, royalty-free licence to use the Content, including image, likeness, and voice, for the purposes set out in Section 2, without any prior approval or inspection. SBI Foundation shall not use the Content in a defamatory, misleading, derogatory, or unlawful manner.

5. Personal Data and Privacy (DPDPA, 2023)

- **Data Minimisation:** Only information necessary for the stated purposes will be collected.
- **Purpose Limitation:** Personal data will not be used beyond purposes specified in this Form without fresh consent.
- **Data Retention:** Personal data shall be retained only as long as necessary, after which it shall be deleted or anonymised.
- **Data Security:** Appropriate technical and organisational safeguards will be applied to protect the Content.
- **Data Fiduciary:** SBI Foundation acts as the Data Fiduciary under the DPDPA, 2023.

6. Right to Withdraw Consent

The Consenting Party may withdraw consent for future use of the Content by using the official SBIF Withdrawal of Consent Form (Appendix G). Such withdrawal shall operate prospectively. SBI Foundation shall endeavour to implement withdrawal within thirty (30) days from receipt.

Special provision for minors: Where consent has been provided on behalf of a minor, that minor shall have the right, upon attaining the age of 18 years, to withdraw consent for continued use of any Content in which they are featured.

7. Release of Liability

The Consenting Party releases SBIF and its officers from liability for use of the Content in accordance with this Form. Nothing herein shall exclude liability arising from fraud, wilful misconduct, gross negligence, or violation of applicable law. The Consenting Party understands that this Form does not obligate SBIF to use the Content.

8. Grievance Mechanism

- **Name / Designation:** Shri Rishi Kumar, Chief Manager, HR and Admin
- **Email:** cm.hr@sbifoundation.co.in
- **Postal Address:** SBI Foundation, No. 35, Ground Floor, The Arcade, World Trade Center, Cuffe Parade, Mumbai, Maharashtra 400005

9. Language and Informed Consent

The Consenting Party confirms that consent is given voluntarily, without coercion, undue influence, or misrepresentation. This Form has been explained in [local language / English]. Where necessary, an interpreter was present.

10. Acknowledgement

The Consenting Party acknowledges that no royalty, licence fee, or other consideration shall be payable by SBI Foundation for the authorised use of the Content.

11. Governing Law

This Form shall be governed by the laws of India. The courts at Mumbai shall have exclusive jurisdiction for disputes not resolved amicably.

12. Signatures

CONSENTING PARTY	COUNTER-SIGNED BY (IMPLEMENTING PARTNER / SBIF OFFICER)
I have read / been explained this Form and grant my consent. **Signature:** _____ **Full Name:** _____ **Age:** _____ **Address:** _____ **Date:** _____ **Place:** _____	**I confirm this Form was explained and the Consenting Party freely consented.** **Signature:** _____ **Name of NGO:** _____ **Name of Officer:** _____ **Designation:** _____ **Date:** _____ **Language used:** _____

FOR MINORS:

Name of Minor: _____ Date of Birth: _____

Relationship to Minor: _____

Signature: _____ Date: _____

* Submit in duplicate. One copy retained by Consenting Party; one copy retained by SBIF.

SBI FOUNDATION

[NAME OF THE PROGRAMME]

WITHDRAWAL OF CONSENT FOR PHOTOGRAPHY, VIDEOGRAPHY & DIGITAL USAGE

DPDPA, 2023 Compliant | Official SBIF Document: Appendix G

1. Parties and Request Details

I, the undersigned (the "Withdrawing Party"), hereby submit this formal request to SBI Foundation and its parent company, subsidiaries, affiliates, licensees, representatives, and their respective successors and assigns (collectively, "SBIF") and [Name of the NGO], to withdraw my consent previously granted in connection with the [Name of the Project] initiative, for the use of photographs, video/film footage, sound recordings, and any other Content featuring me / my children / my wards.

2. Details of Original Consent

Date of Original Consent	_____
Name of Programme / Project	_____
Implementing NGO Partner	_____
Location where Content was captured	_____

3. Scope of Withdrawal

- [ ] All photographs featuring me / the minor named below
- [ ] All video/film footage featuring me / the minor named below
- [ ] All audio/sound recordings featuring me / the minor named below
- [ ] Use of my name and/or likeness in any materials
- [ ] All of the above (complete withdrawal)

4. Effect of Withdrawal

- The withdrawal of consent shall take effect from the date on which this Form is received by SBIF (the "Effective Date") and shall apply to all future use of the Content by SBIF and/or the Implementing Partner, subject to the provisions of this Clause.
- For the avoidance of doubt, such withdrawal shall not affect: (a) any use of the Content that occurred prior to the Effective Date; or (b) any Content that, as of the Effective Date, is already in the process of being printed, published, distributed, circulated, or otherwise committed for publication or distribution (the "In-Progress Content").
- Upon receipt of this Form, SBIF shall take all reasonable and practicable steps to cease, withdraw, or discontinue the further use, publication, distribution, or circulation of the relevant Content, including In-Progress Content, within thirty (30) days from the Effective Date (the "Withdrawal Completion Date"), or within such longer period as may be reasonably necessary due to applicable law, regulatory requirements, or practical or technical constraints.
- Any publication, distribution, or circulation of In-Progress Content during the period between the Effective Date and the Withdrawal Completion Date (the "Interim Period") shall not, by itself, constitute a breach of the withdrawal of consent, and shall be deemed to be covered by the consent previously granted. Accordingly, no liability shall accrue to SBIF or the Implementing Partner solely on account of such use during the Interim Period.
- Notwithstanding the foregoing, withdrawal of consent shall not require SBIF or the Implementing Partner to cease or remove any use of the Content to the extent such use is required for regulatory reporting, legal or statutory compliance, audit, record-keeping, or CSR disclosure purposes, in each case to the extent permitted or required under applicable law. SBIF shall not be obligated to retrieve, recall, destroy, or procure removal of Content that was printed, published, distributed, archived by third parties, republished by third parties, or incorporated into reports,

publications, regulatory submissions, media coverage, or public records prior to the Withdrawal Completion Date.

- Upon successful completion of the withdrawal process and subject to statutory retention obligations under the Digital Personal Data Protection Act, 2023 and other applicable law, SBIF shall review the relevant records and, where feasible and lawful, delete or anonymise personal data associated with the Content. SBIF shall use reasonable efforts to notify implementing partners and service providers regarding the withdrawal request.

5. Special Provision for Minors

Name of Minor	_____
Date of Birth of Minor	_____
Relationship to Minor	_____

6. Grievance and Contact Details

- **Name / Designation:** Shri Rishi Kumar, Chief Manager, HR and Admin
- **Email:** cm.hr@sbifoundation.co.in
- **Postal Address:** SBI Foundation, No. 35, Ground Floor, The Arcade, World Trade Center, Cuffe Parade, Mumbai, Maharashtra 400005

7. Governing Law

This Withdrawal Form shall be governed by the laws of India. The courts at Mumbai shall have exclusive jurisdiction for disputes not resolved amicably.

8. Signatures

WITHDRAWING PARTY	RECEIVED BY (IMPLEMENTING PARTNER / SBIF OFFICER)
Signature: _____	**Signature:** _____
Full Name: _____	**Name of NGO / SBIF:** _____
Age: _____	**Name of Officer:** _____
Address: _____	**Designation:** _____
Contact No.: _____	**Date of Receipt:** _____
Date: _____	**Place:** _____
Place: _____	**SBIF Reference No.:** _____

FOR MINORS:

Name of Minor: _____ Date of Birth: _____

Relationship to Minor: _____

Signature: _____ Date: _____

* Submit in duplicate. One copy retained by Withdrawing Party; one copy retained by SBIF.

Appendix H: Partner Acknowledgement of Receipt

By signing below, the authorised representative of the partner organisation confirms that they have received, read, and understood the SBI Foundation Communications and Visibility Policy for Partners 2026 (Version 2.0) and agree to comply with its requirements for the duration of the grant agreement.

Partner Organisation Name	_____
Project Name	_____
Grant Letter Reference No.	_____
Name of Authorised Signatory	_____
Designation	_____
Date	_____
Name of Communications POC	_____
Communications POC Email	_____
Communications POC Phone	_____

Signature of Authorised Signatory: _____

Please sign and return this page to communications@sbifoundation.co.in within 15 days of receiving these guidelines. Retain a copy for your records.

FOR SBIF USE ONLY

Received by: _____ Date received: _____

SBIF Reference No.: _____