Working with Business Development Templates
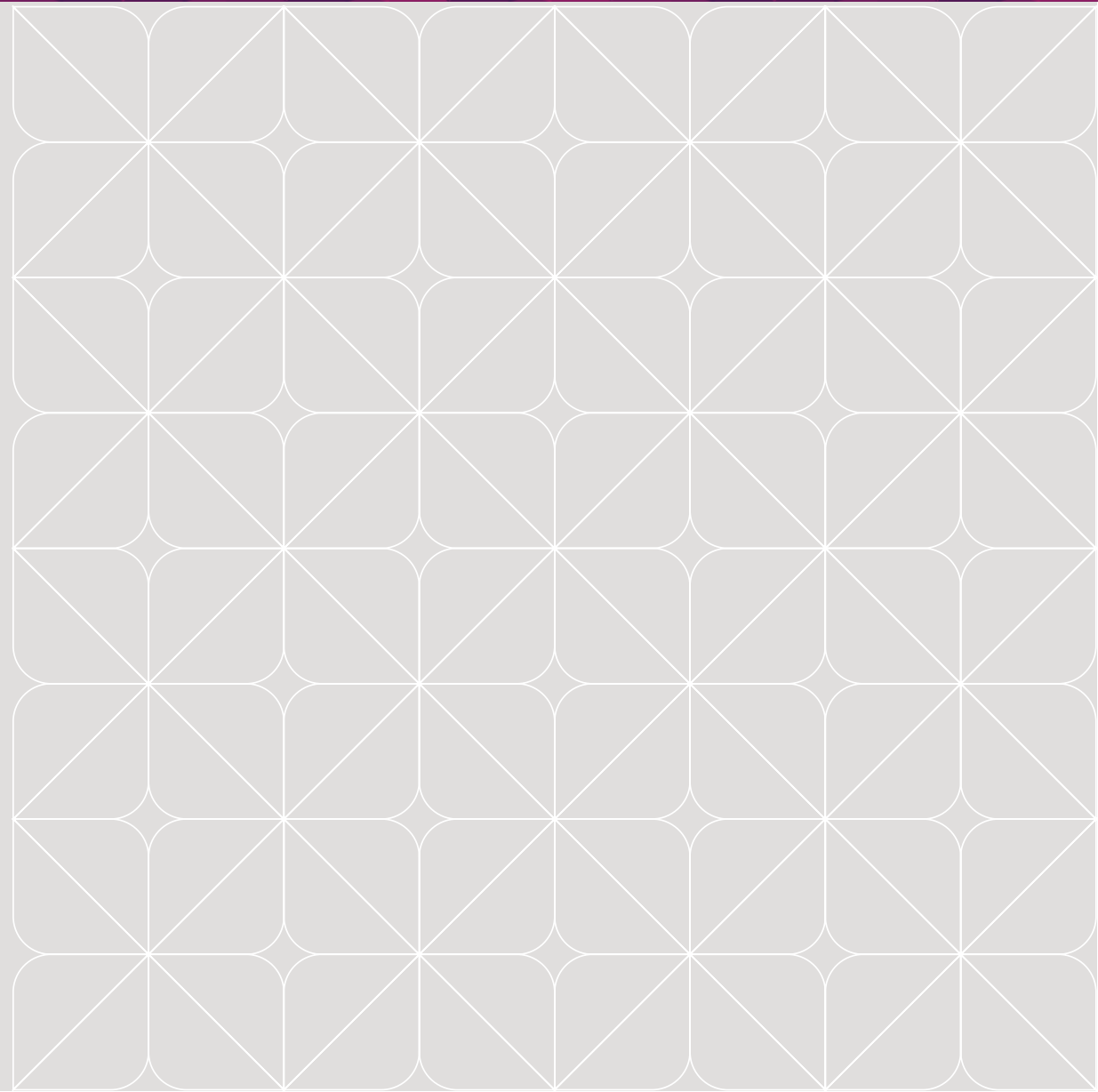
Rachel Elrom, Editorial Content Manager

March 13, 2023

pact
building local promise.

Agenda

- Introducing the new BD templates
- Explaining the formatting structure
- Applying the programmed styles
- Setting up the pages
- Troubleshooting headers, footers, and page numbering
- Using elements (tables, graphics, figures, text boxes, pictures)

Introducing the templates

Why standard templates?

- They adhere to the Pact brand and keep reviewers familiar with that brand.

- They adhere to basic donor requirements for 95% of our public sector BD work.

- They allow you to add more text and elements by maximizing space and spacing.

- They are built to do the work for you.

- If we need to change the formatting (e.g., spacing, font size) in a specific BD document, we can do that in less than 5 minutes.

What templates do we have?

- USG proposal technical narrative (posted shortly)
- USG proposal budget notes (posted shortly)
- FCDO proposal technical narrative
- GAC proposal technical narrative
- Short template for BAFO, questions, RFIs, concept notes
- CSM-STAND technical narrative
- CSM-STAND budget notes (forthcoming)
- More as necessary

How are the templates structured?

- Appropriately sized and spaced to meet funder requirements
- Pre-programmed with the right/optimal formatting specifications
- Contain *some* instructions on use
- Budget notes templates are prescriptive, technical narrative templates never will be

More resources

- BD resources on Mosaic: https://mosaic.pactworld.org/departments/bd/bd_resources~6
- Technical Writing COP resources: https://mosaic.pactworld.org/communities/cops/twcop/resources

Template formatting
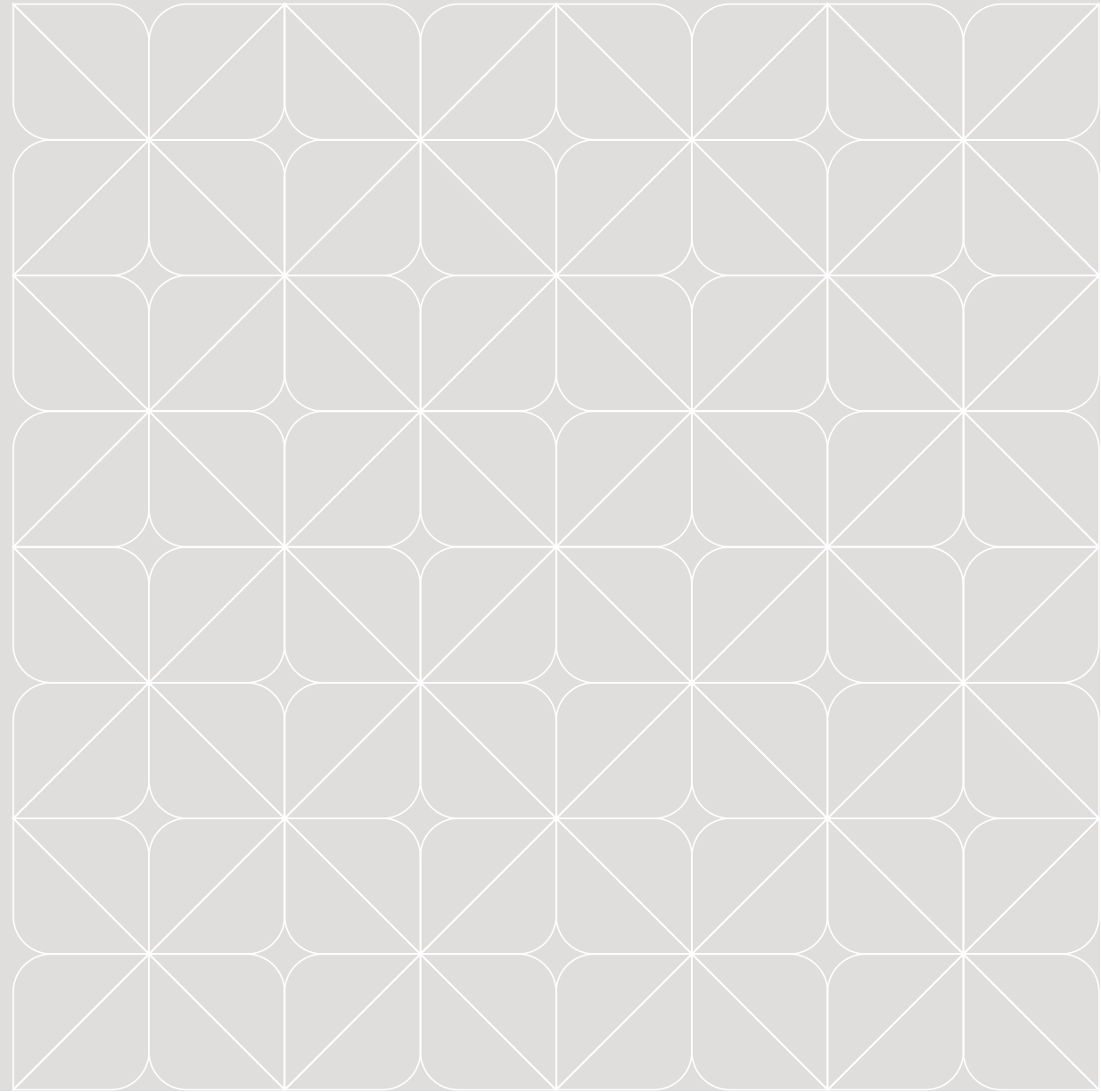
How does formatting work in MS Word?

- The templates are calibrated for Office 365, but should work in Office 2016 and 2013. They will not work in versions of Word older than Office 2013.

- Pages are built on layers.

- The features you can access depends on the page view.

- Font size and font, paragraph, and page spacing are based mostly on points.

- How many points you can fit on a page depends on your font.

- Word accounts for spacing and placement if you let it.

- Every document has built-in styles, which tell the text how to behave in terms of font type and size, spacing, tabs, bullets and numbering, language, hierarchy, and more.

How to use styles (1)

How to use styles (2)

How to use styles (3)

How to use styles (4)

Setting up pages

What to know about page layout

- Page size
- Margins
- Page orientation: landscape vs. portrait
- Page breaks: take you to a new page
- Section breaks: allow you to switch page orientations and create different page numbering and header/footer schemes

How do I adjust page layout?

What if I need a new section?
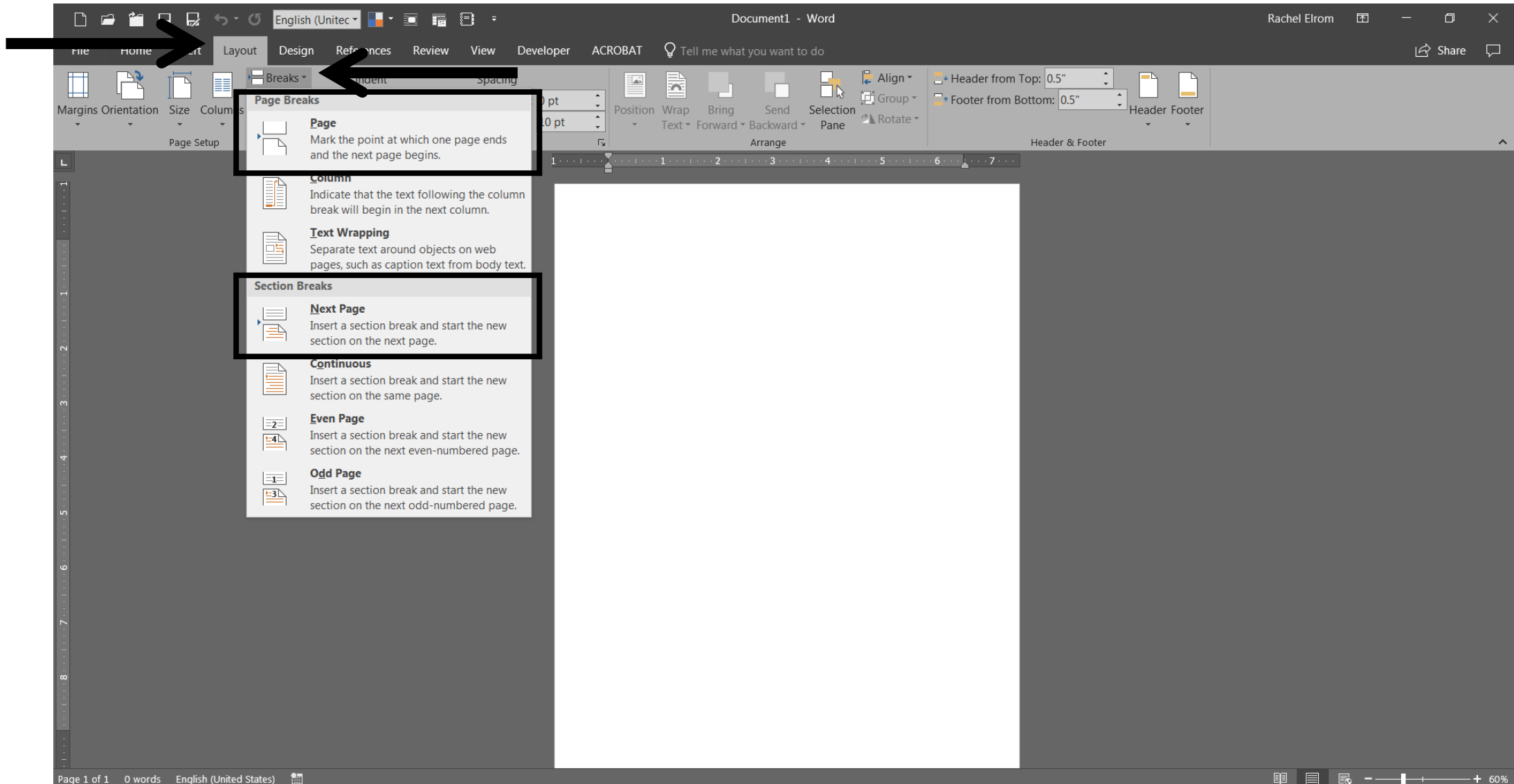
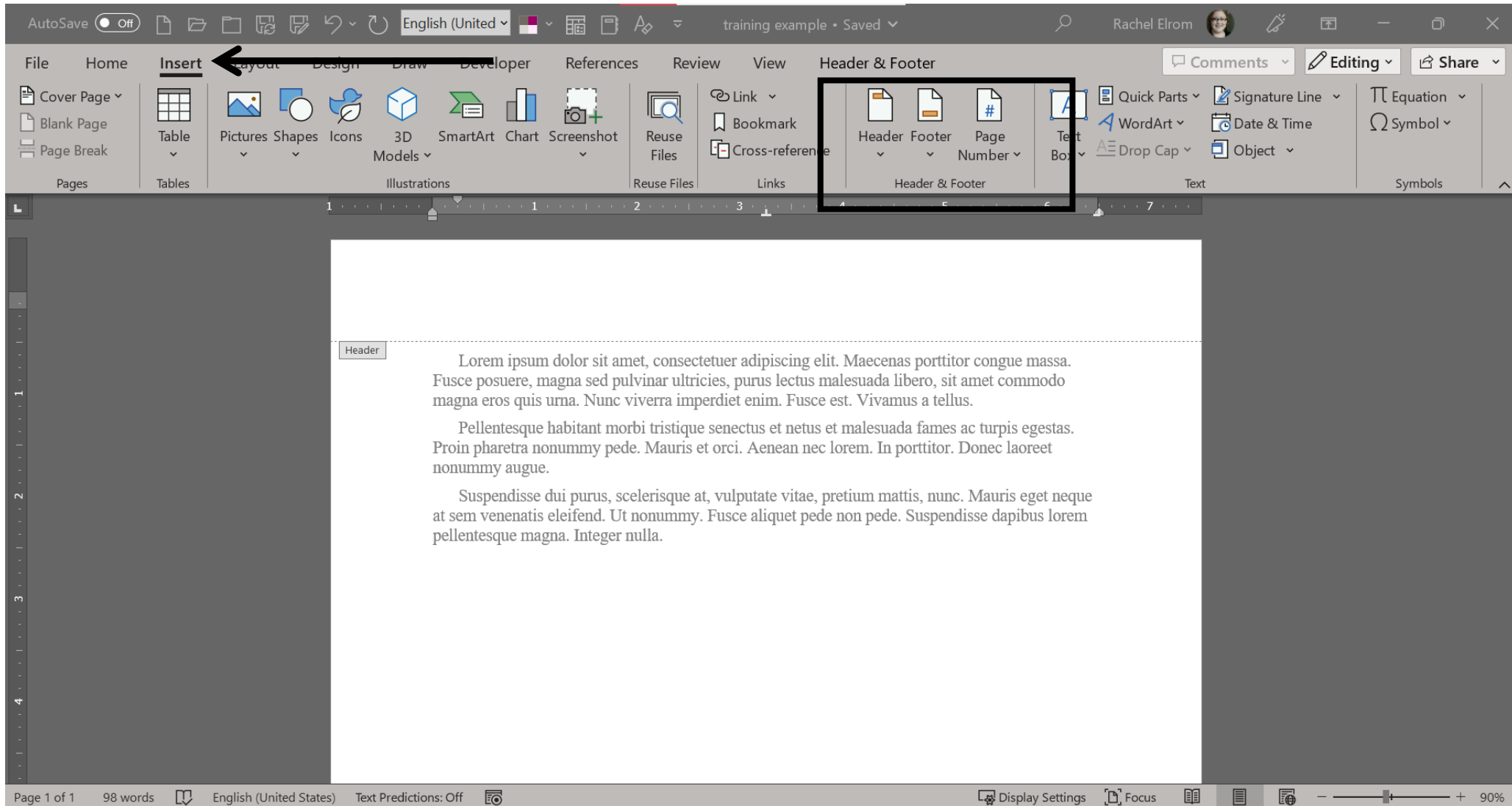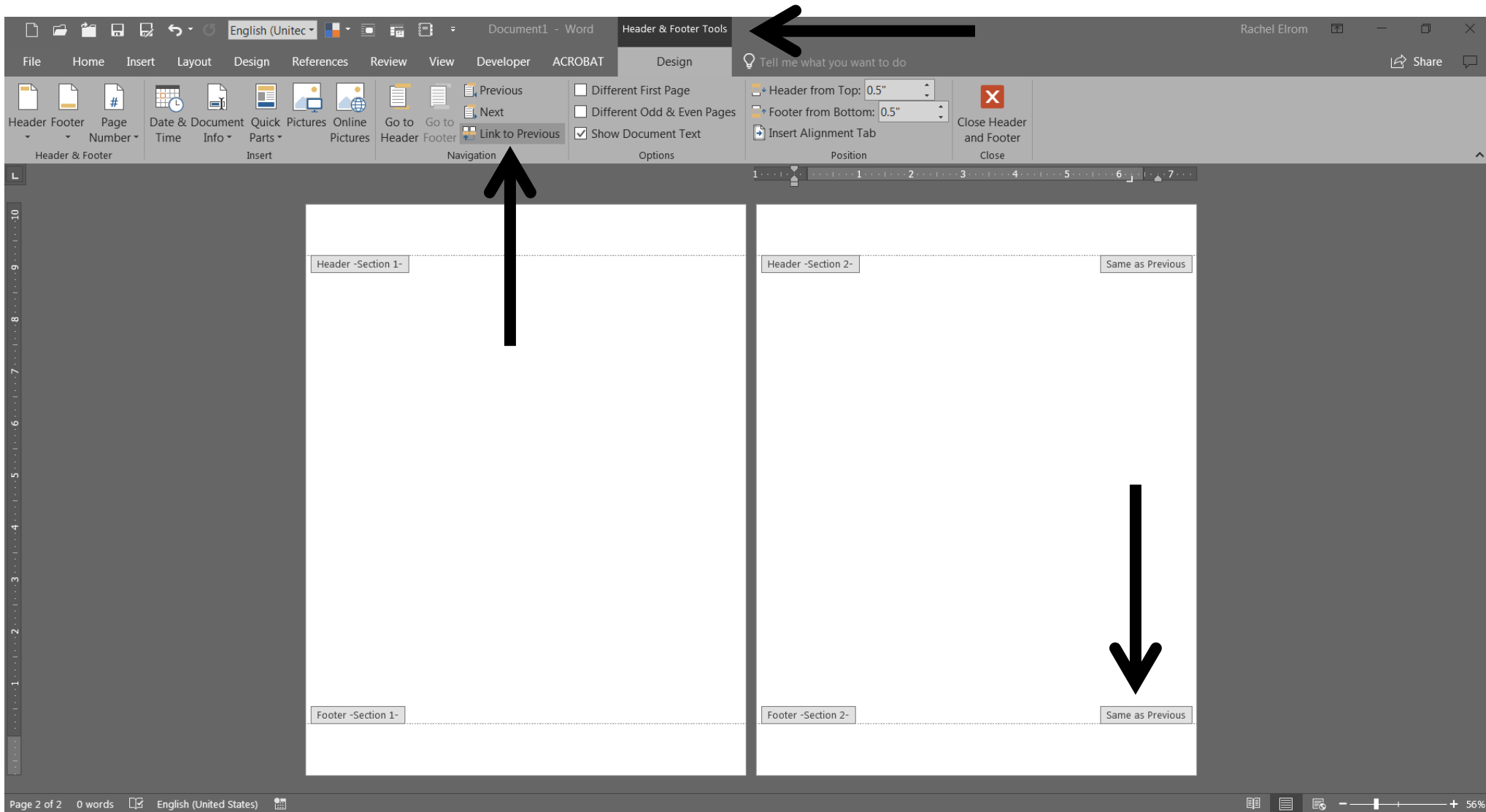# Trouble-shooting page layout issues
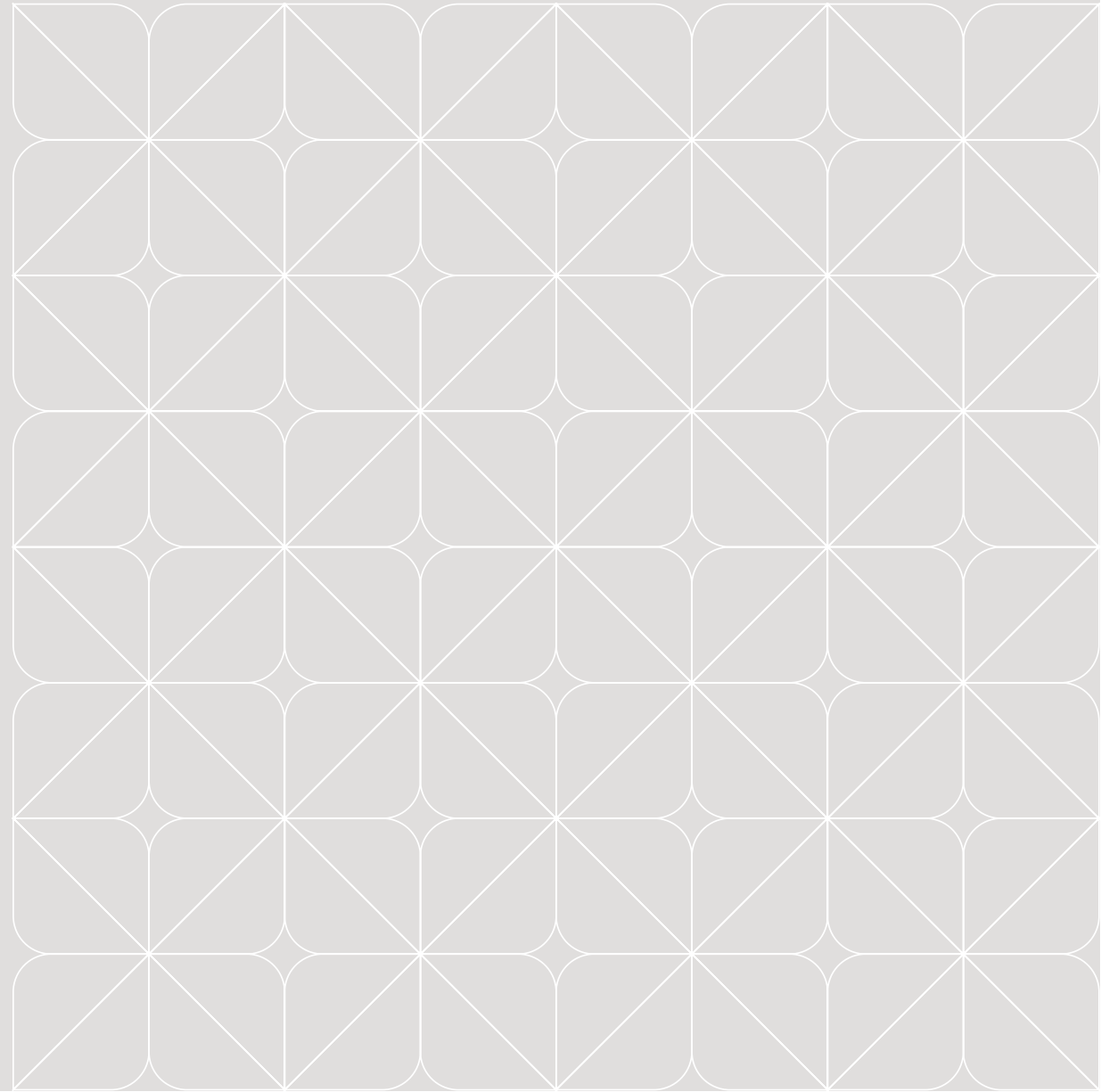
How to access headers and footers

How to link or de-link pages
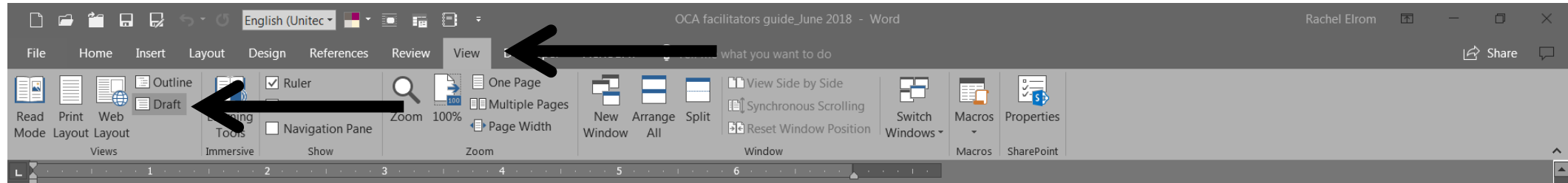
What do I do if the page number is still off?

What if I didn't want multiple sections?

Best practices
for elements
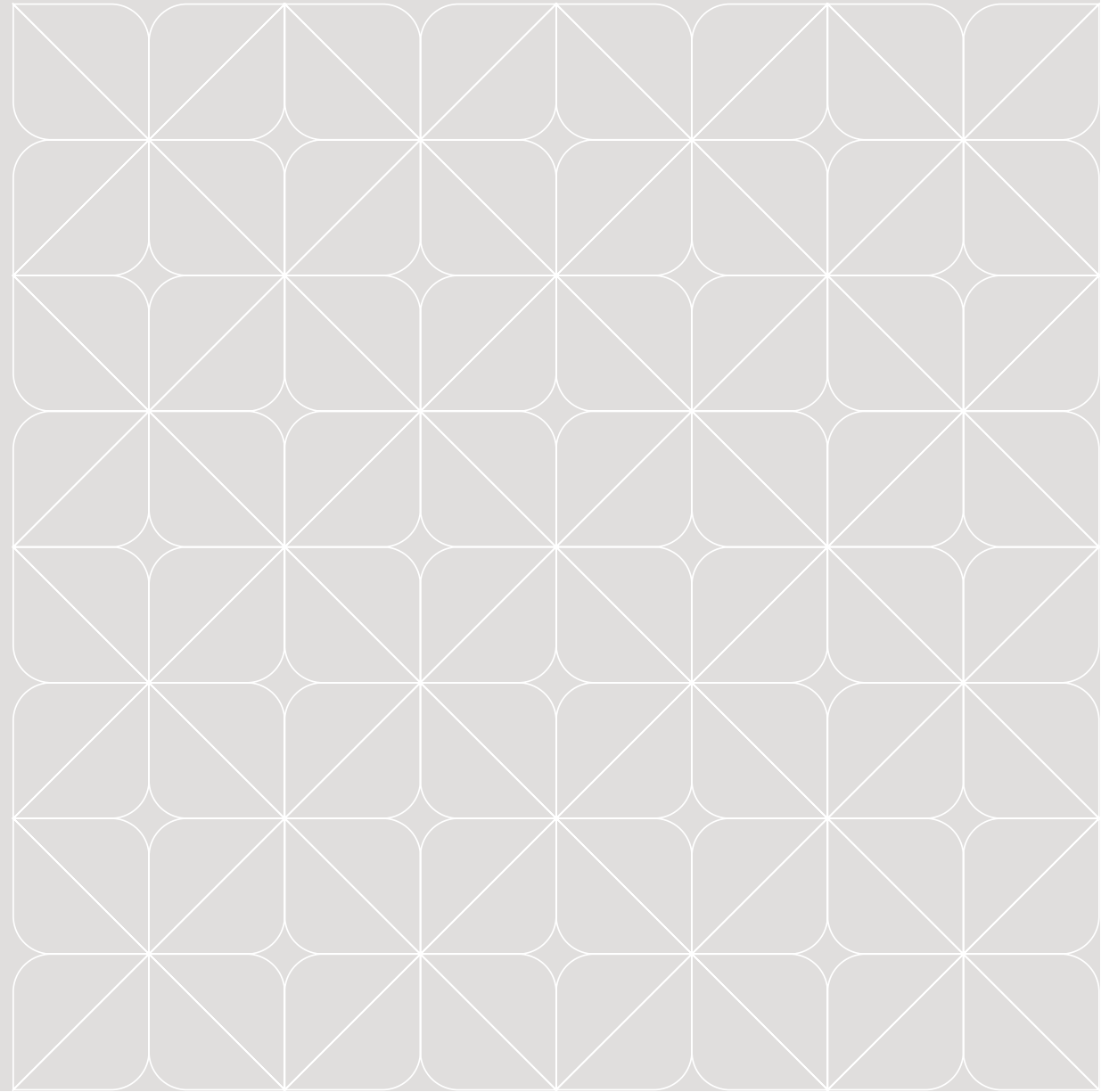
What are elements?

Anything that is not text:

- Figures
- Graphics
- Text boxes
- Photographs

- Tables

Maximizing spacing around elements (1)

Maximizing spacing around elements (2)

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- PNG file
- Transparent background
- Tight wrapped

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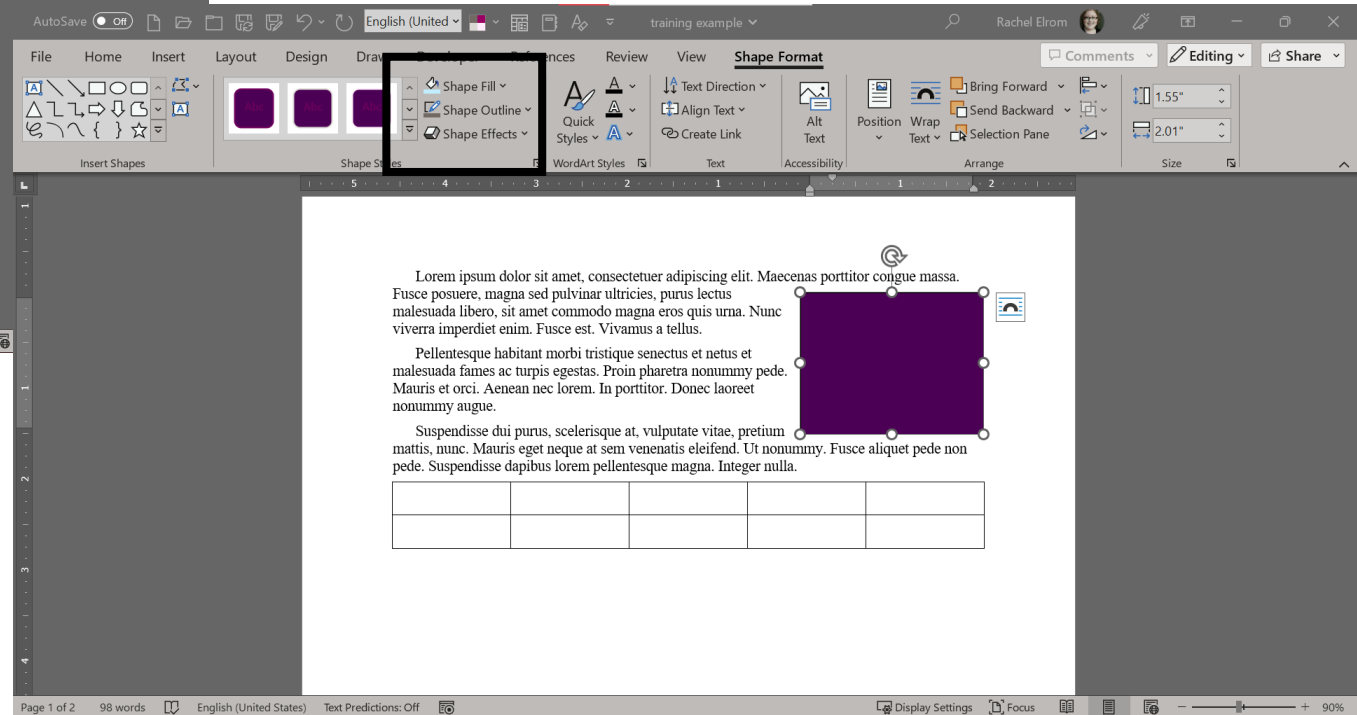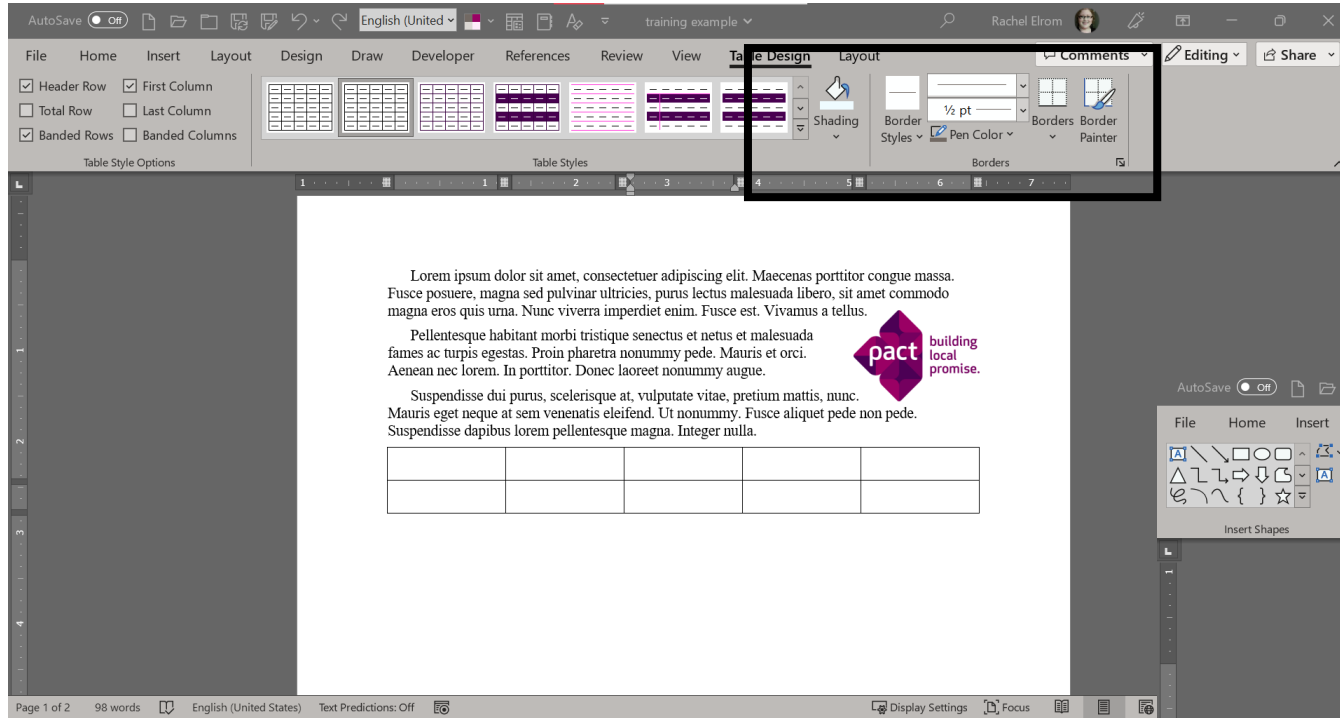- Any file with a white/colored background
- Square wrapped

What about tables?

Adding color to tables and text boxes

Questions?