

# Working with Business Development Templates



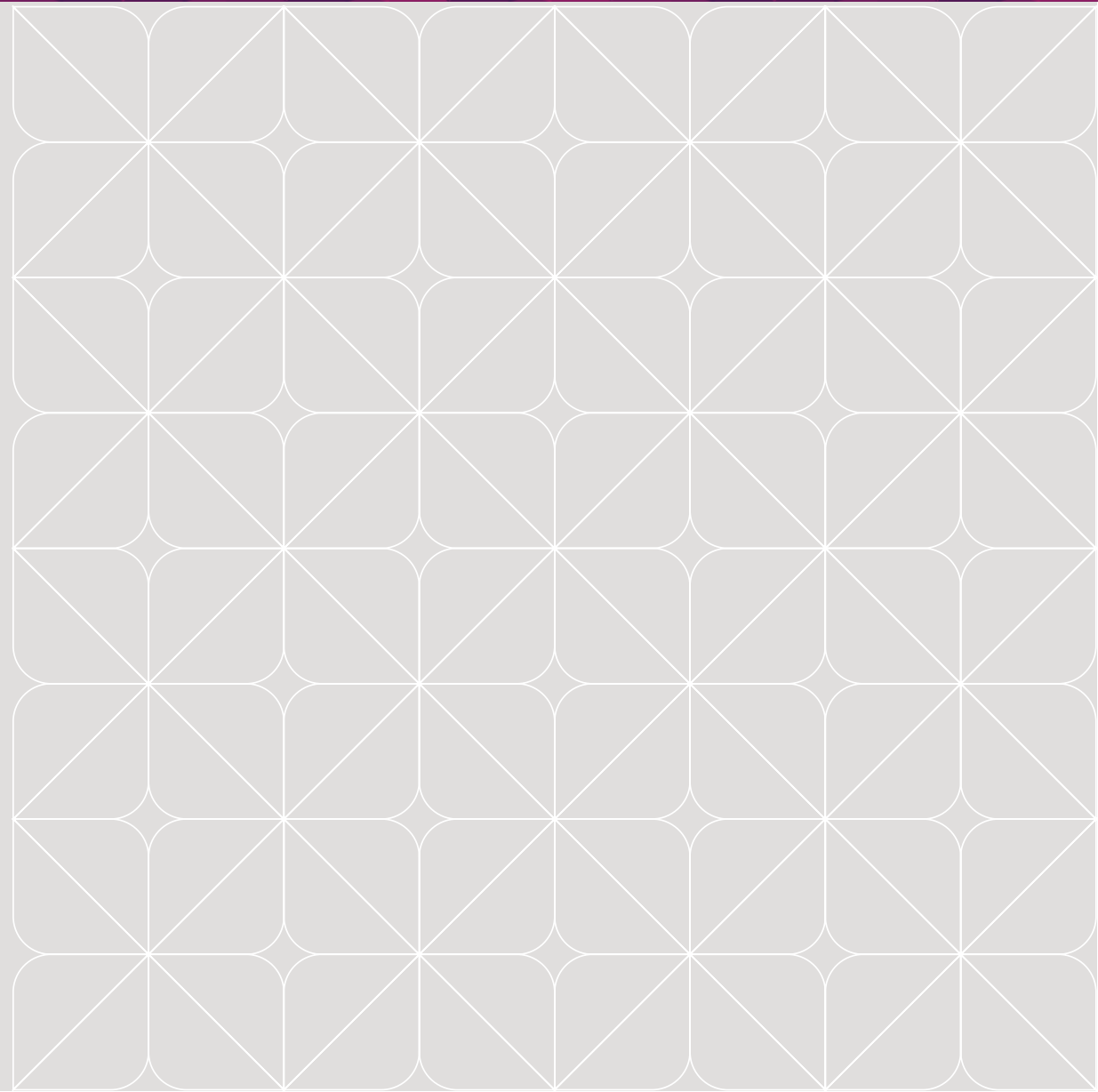
**Rachel Elrom, Editorial Content Manager**

**March 13, 2023**

# 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



## 1 Instructions

### Directions:

- Prompts and instructions are in comments throughout.
- Example sections and tables are provided that fit with specific funders' requirements. You may not need every section or may need to add additional sections, depending on the NOFO requirements and award mechanism. Delete or add sections as required.
- Replace the highlighted text on the cover and in headers with the appropriate information for the specific bid.
- Each table comes in two versions: one that uses 12 pt font and one that uses 10 pt font. The NOFO (or instructions from the proposal manager) will specify which size font to use.
- Contact Stefan Peterson or Adam Fritz to create the cover picture reel.
- Remember to delete all instructions and unused tables and remove any highlighting before completion and submission.

# More resources

- BD resources on Mosaic:

[https://mosaic.pactworld.org/departments/bd/bd\\_resources~6](https://mosaic.pactworld.org/departments/bd/bd_resources~6)

- Technical Writing COP resources:

<https://mosaic.pactworld.org/communities/cops/twcop/resources>

## MS WORD FORMATTING RESOURCES

# A B C D E F G **H** I J K L M N O P Q R S T U V W X Y Z

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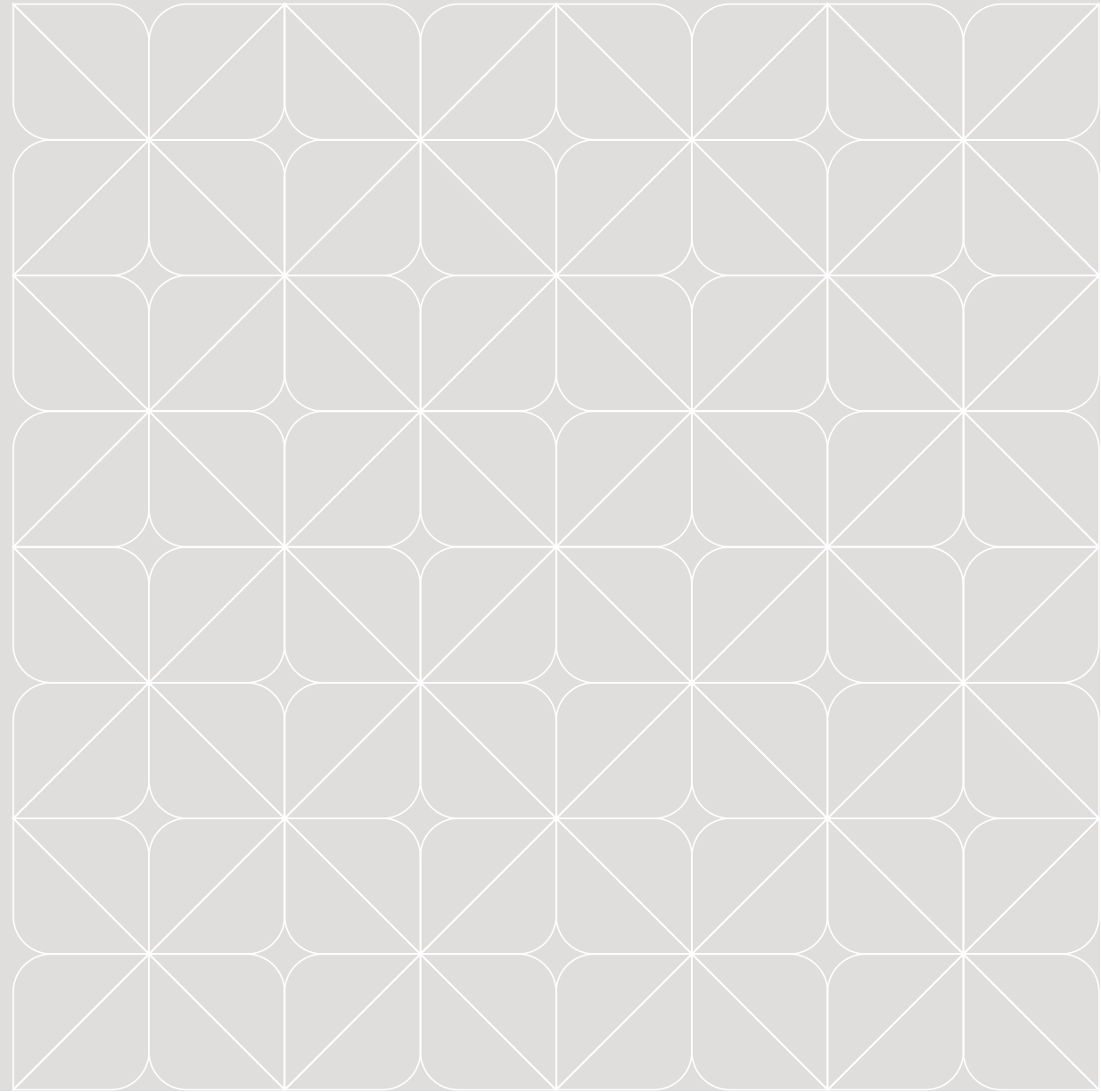
Top

How to Take Control of the "Back End" of a Microsoft Word Document (video) ▾

0 comments | 10 views | Technical Writing COP

+ Add Article

# 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)

The screenshot displays the Microsoft Word interface. The ribbon is set to the 'Home' tab, and the 'Styles' gallery is open, showing three styles: 'Abbrevi...', 'Body Text', and 'Cover le...'. A black box highlights the Styles gallery, and a black arrow points to the 'Home' tab. The document content includes the 'pact building local promise.' logo, a collage of images showing community activities, and a section titled 'Instructions' with the following directions:

**Instructions**  
**Directions:**

- Prompts and instructions are in comments throughout.
- Example sections and tables are provided that fit with specific funders' requirements. You may not need every section or may need to add additional sections, depending on the NOFO requirements and award mechanism. Delete or add sections as required.
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- Contact Stefan Peterson or Adam Fritz to create the cover picture reel.
- Remember to delete all instructions and unused tables and remove any highlighting before completion and submission.

The document also features a 'Project Name' placeholder in a green box at the bottom.

Page 1 of 18   3789 words   English (United States)   Text Predictions: Off   Display Settings   Focus   90%

# How to use styles (2)

The screenshot shows the Microsoft Word interface with the following elements:

- File Name:** Proposal technical narrative tem... Saved
- Language:** English (United States)
- Home Tab:** Font (Times New Roma, 12), Paragraph, Styles (AaBbCcI, Body Text, Cover le...), Editing (Find, Replace, Select).
- Document Content:**
  - Logo: **pact** building local promise.
  - Image collage: A central collage of photos showing people in various settings, including a woman, a man, and a group of people. A sign in the collage lists "Services Offered": HIV Testing & Counseling, Economic Strengthening, Condom Distribution, Post GBV Care (Referral), and Financial Literacy Planning (Women Aged 10-24).
  - Text Box: **Instructions**  
**Directions:**
    - Prompts and instructions are in comments throughout.
    - Example sections and tables are provided that fit with specific funders' requirements. You may not need every section or may need to add additional sections, depending on the NOFO requirements and award mechanism. Delete or add sections as required.
    - Replace the highlighted text on the cover and in headers with the appropriate information for the specific bid.
    - Each table comes in two versions: one that uses 12 pt font and one that uses 10 pt font. The NOFO (or instructions from the proposal manager) will specify which size font to use.
    - Contact Stefan Peterson or Adam Fritz to create the cover picture reel.
    - Remember to delete all instructions and unused tables and remove any highlighting before completion and submission.

# How to use styles (3)

The screenshot displays the Microsoft Word interface for a document titled "Proposal technical narrative tem...". The ribbon is set to the "Home" tab, showing font settings (Times New Roma, size 12) and paragraph options. The document content includes a purple header with the "pact building local promise." logo, a collage of photos showing community activities, and a green box labeled "Project Name". A red circle with the number 1 highlights the "Instructions" section in the text. The Styles pane on the right lists various styles, including "Pact USG tech narrative abbreviations and acronyms list", "Pact USG tech narrative body text", and "Pact USG tech narrative cover page headings".

**Instructions**  
**Directions:**

- Prompts and instructions throughout.
- Example sections with specific funding need every section of sections, depending award mechanism. If required.
- Replace the highlighted headers with the appropriate specific bid.
- Each table comes in pt font and one that instructions from the which size font to use.
- Contact Stefan Peters cover picture reel.
- Remember to delete tables and remove at completion and sub

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# How to use styles (4)

Styles ▾

Pact proposal body text	¶
Pact USG tech narrative abbreviations and acronyms list	¶
Pact USG tech narrative body text	¶
Pact USG tech narrative bulleted and numbered lists	¶
Pact USG tech narrative cover page headings	¶
Pact USG tech narrative cover page project name	¶
Pact USG tech narrative cover page text	¶
Pact USG tech narrative CV heading	¶a
Pact USG tech narrative CV references	¶
Pact USG tech narrative CV text	¶a
Pact USG tech narrative emphasized text	a
Pact USG tech narrative footer	¶
Pact USG tech narrative footnote text	¶
Pact USG tech narrative header	¶
Pact USG tech narrative heading 1	¶
Pact USG tech narrative heading 2	¶
Pact USG tech narrative heading 3	¶

Show Preview

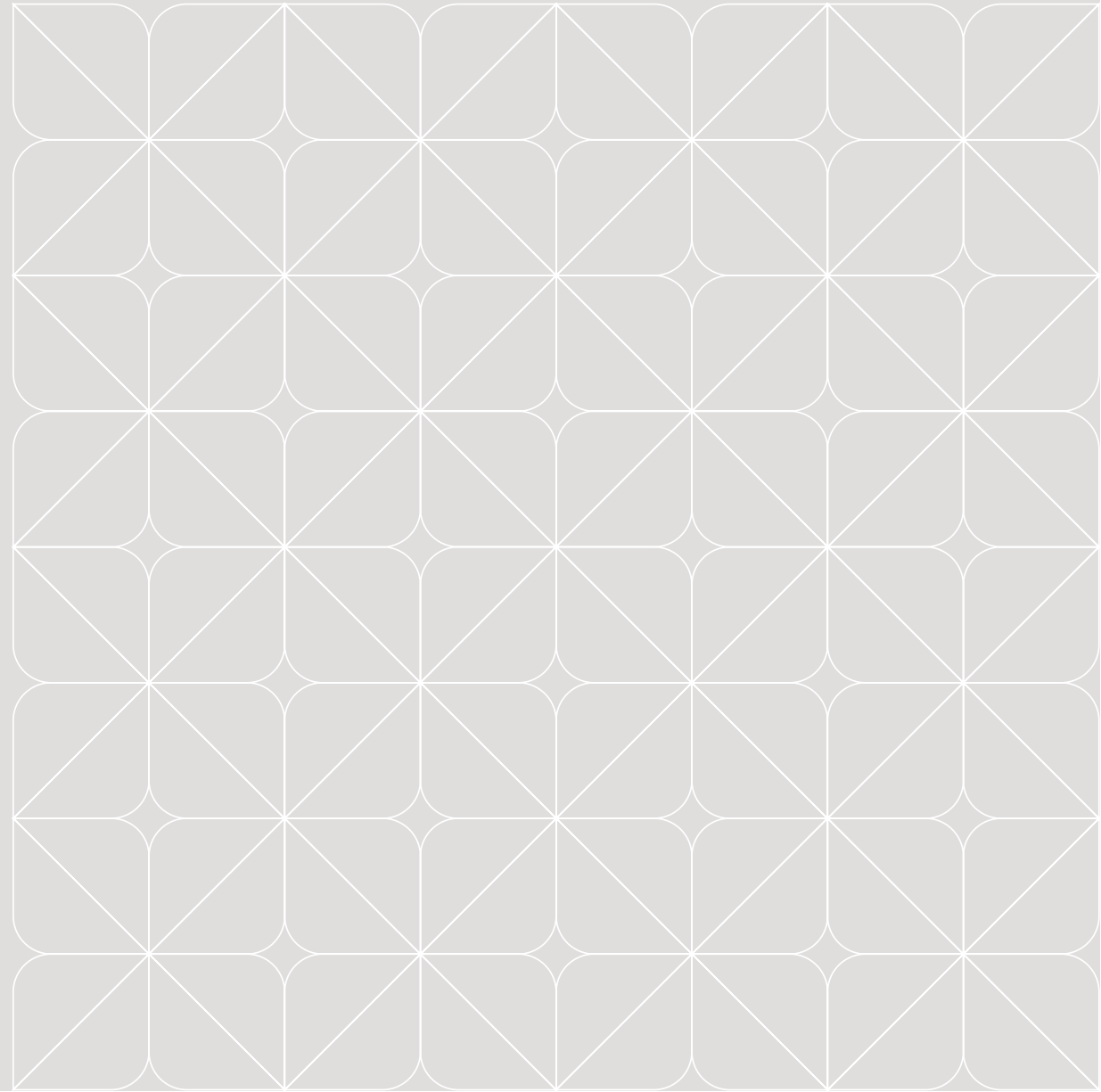
Styles ▾

Pact USG tech narrative abbreviations and acronyms	¶
Pact USG tech narrative body text	¶
• Pact USG tech narrative bulleted and numbered lists	¶
<b>Pact USG tech narrative cover page headings</b>	¶
<b>Pact USG tech narrative cover page project name</b>	¶
Pact USG tech narrative cover page text	¶
<b>Pact USG tech narrative CV heading</b>	¶a
Pact USG tech narrative CV references	¶
Pact USG tech narrative CV text	¶a
<b>Pact USG tech narrative emphasized text</b>	a
<hr/>	
<i>Pact USG tech narrative footer</i>	¶



Show Preview



# 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?

The screenshot displays the Microsoft Word interface. The **Layout** ribbon is highlighted, with a black box around its icons: Margins, Orientation, Size, Columns, Breaks, Line Numbers, and Hyphenation. The ribbon also shows Paragraph and Arrange groups. The document content includes the **pact** logo (building local promise), a collage of photos showing community members and a sign for 'Services Offered' (HIV Testing & Counseling, Economic Strengthening, Condom Distribution, Post GBV Care Referral, Financial Literacy Training for Women Aged 10-24y), and a green box labeled **Project Name**. On the right, an **Instructions** section provides directions for editing the proposal.

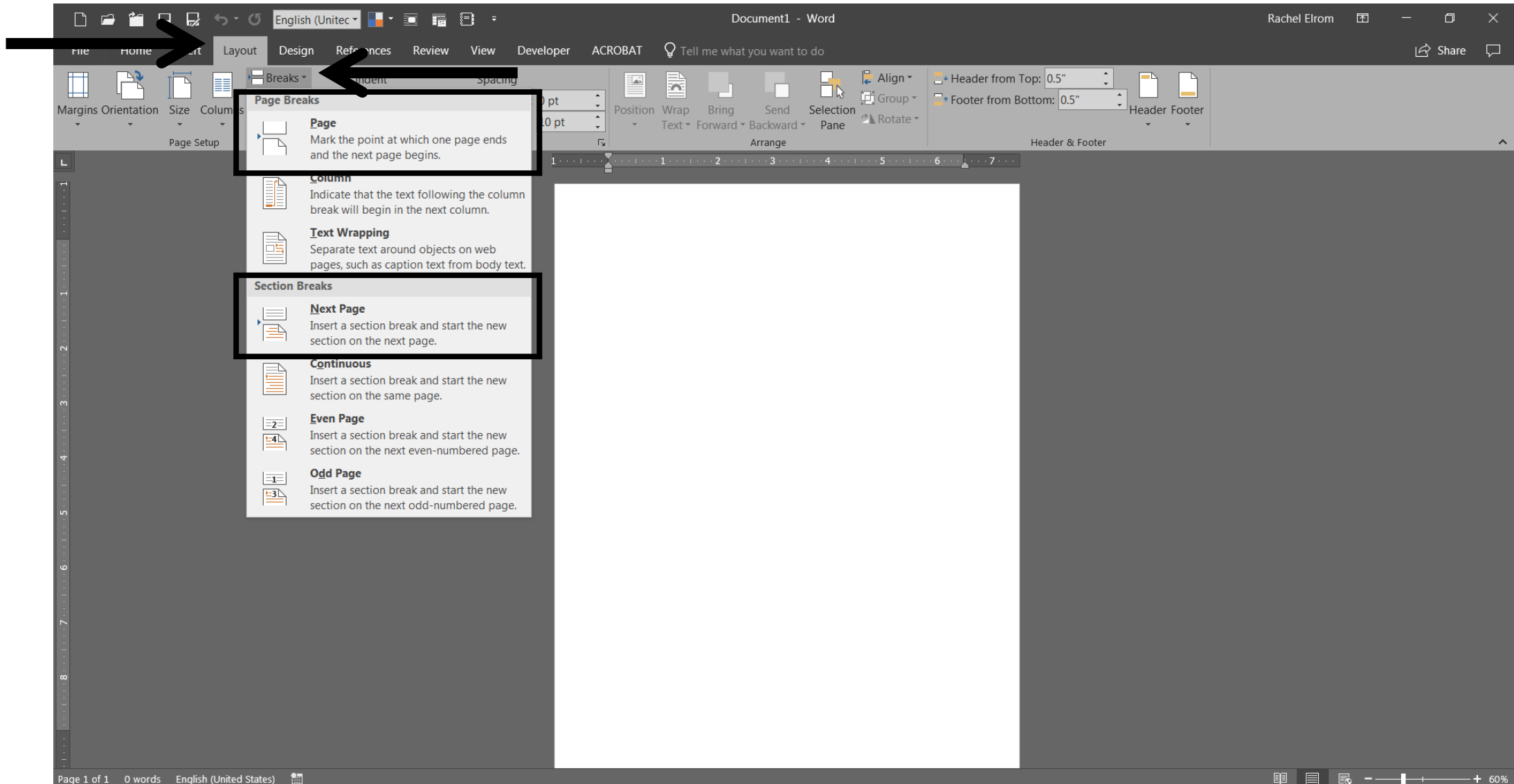
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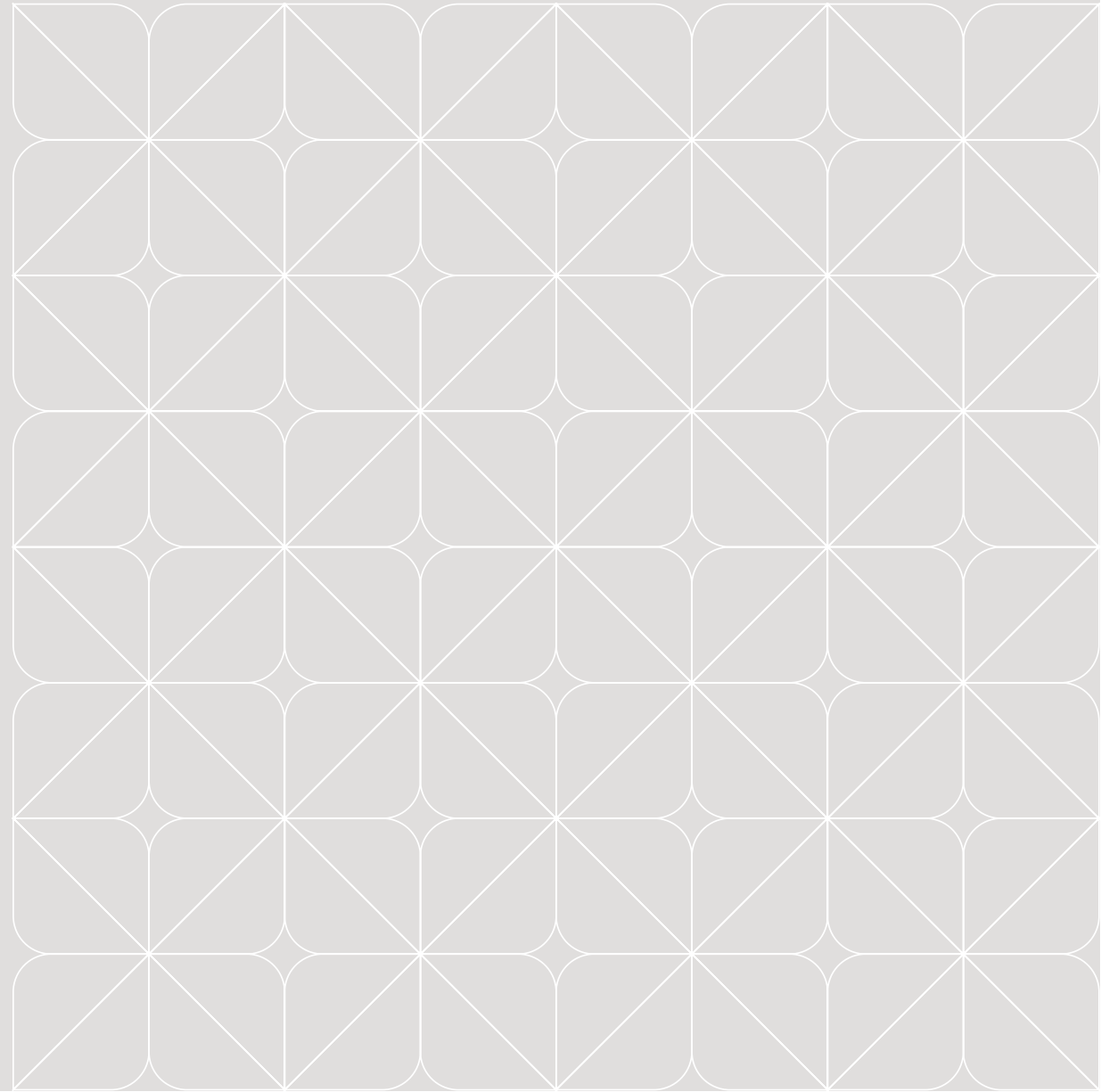
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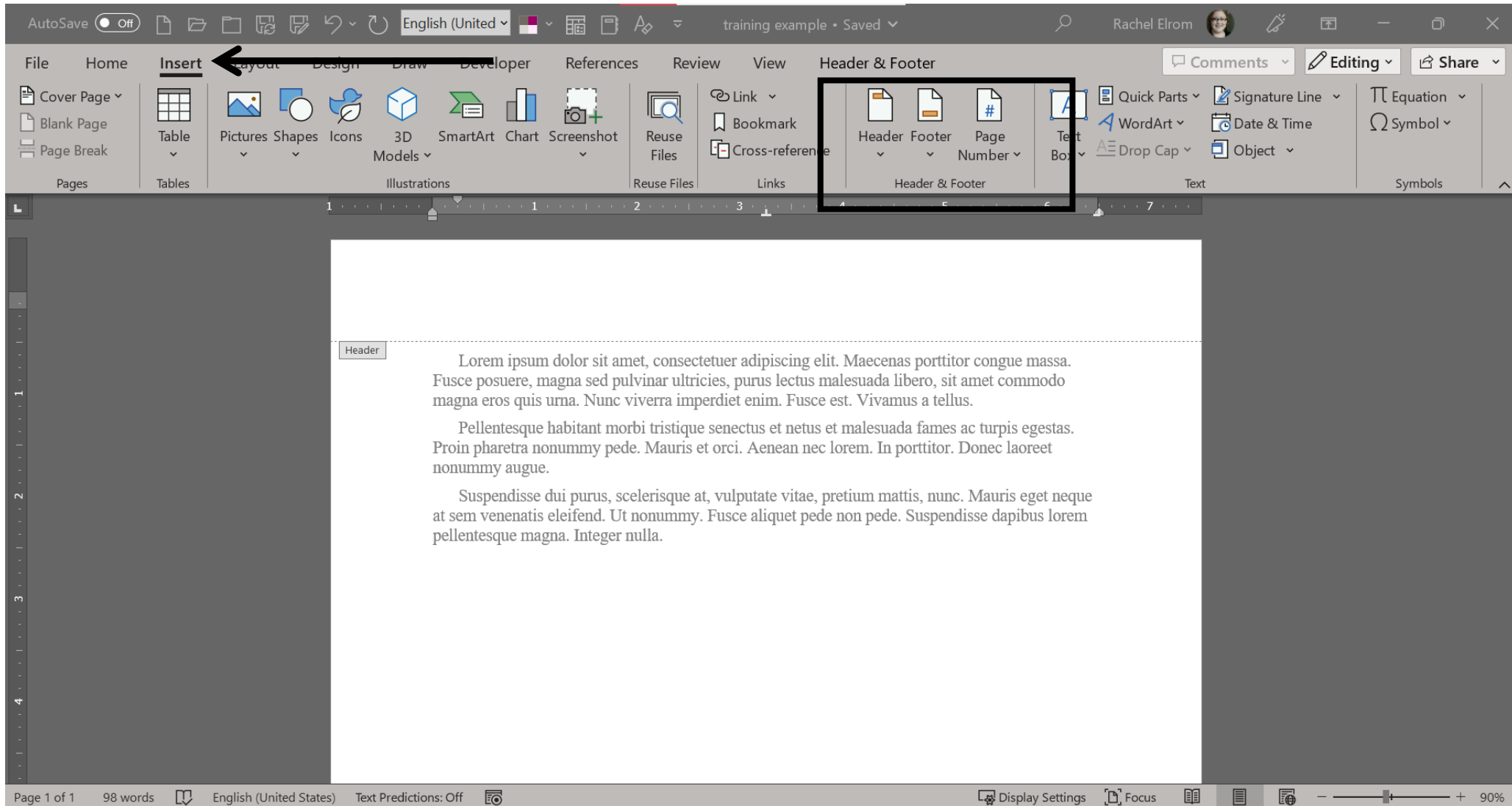
# What if I need a new section?



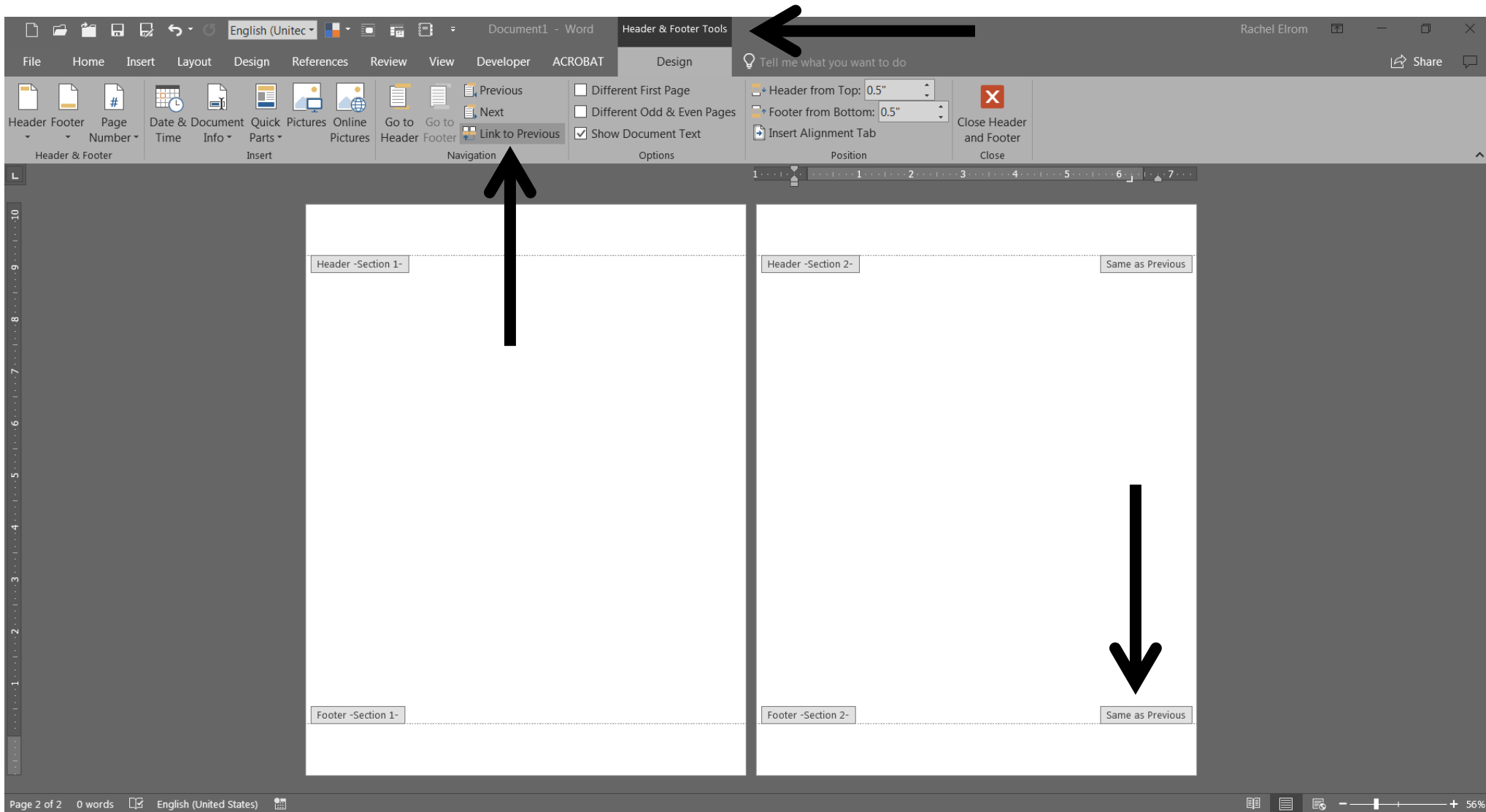
# Trouble- shooting page layout issues



# How to access headers and footers



# How to link or de-link pages



# What do I do if the page number is still off?

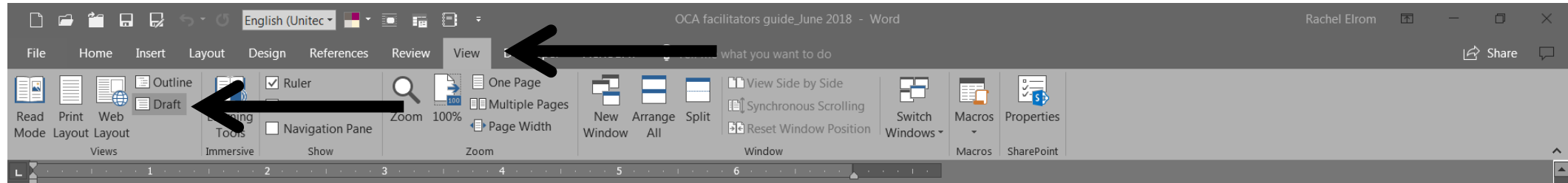
The screenshot displays the Microsoft Word interface with the **Header & Footer** ribbon selected. The **Page Number** button in the ribbon is highlighted with a black box. A dialog box titled **Page Number Format** is open, showing the following settings:

- Number format: 1, 2, 3, ...
- Include chapter number
- Chapter starts with style: Heading 1
- Use separator: - (hyphen)
- Examples: 1-1, 1-A
- Page numbering:
  - Continue from previous section
  - Start at: [ ]

The dialog box has **OK** and **Cancel** buttons. In the background, the document shows a page number '1' and a header section labeled 'Header -Section 2-'. A black arrow points from the 'Continue from previous section' option in the dialog box to the 'Same as Previous' button in the header area.

Page 1 of 2 98 words English (United States) Text Predictions: Off Display Settings Focus 90%

# What if I didn't want multiple sections?



continuum of care for children, policy and legislation advocacy, education, or workforce safety.

## The OCA Process

The OCA is made up of a multi-phase process, as demonstrated in the diagram at right. Each phase contains a set of steps, explained in its own chapter of this handbook, and requires facilitator guidance.

## Facilitating the OCA

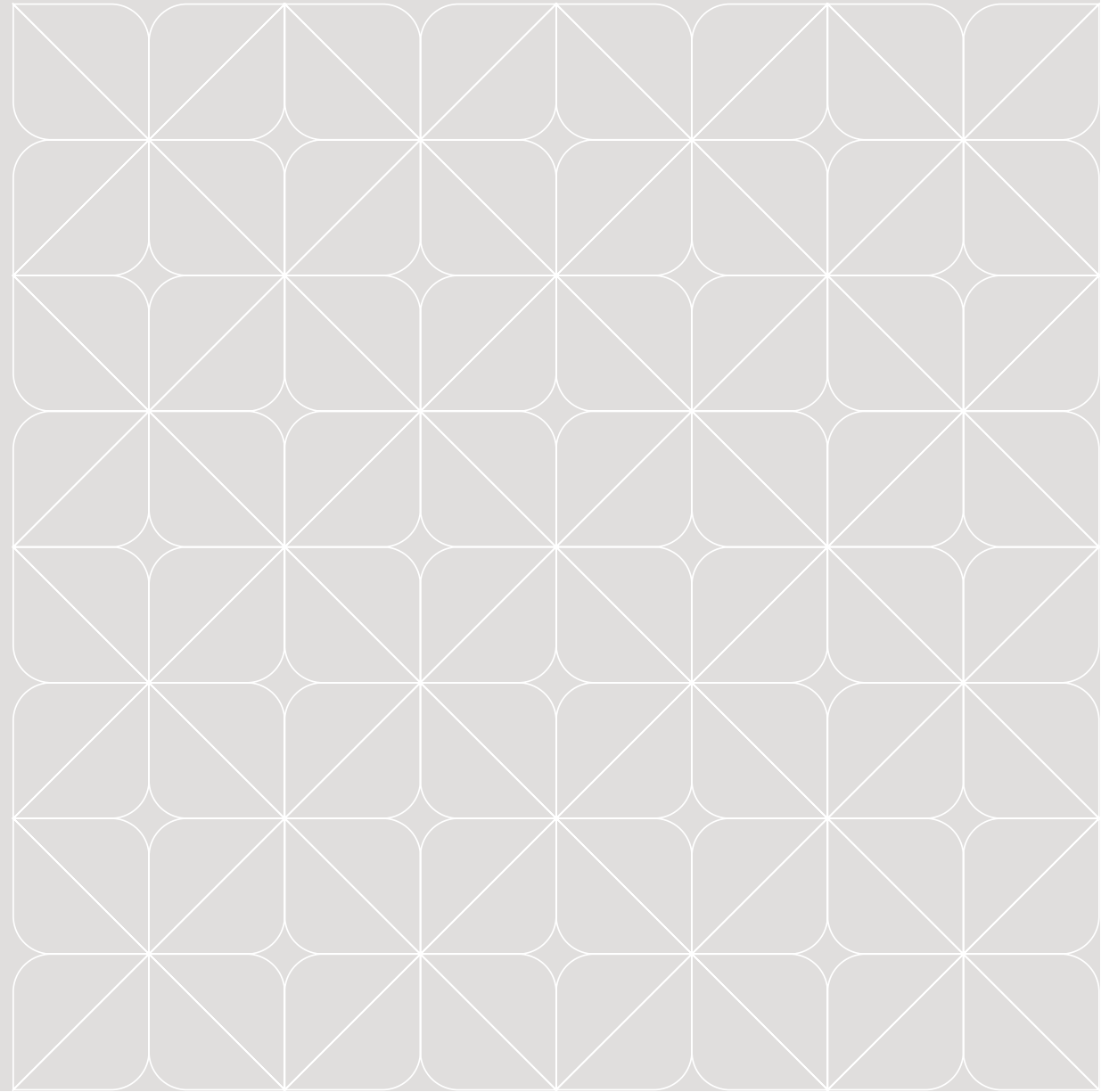
Effective facilitation is key to a successful OCA process. Both participants and facilitators play crucial roles in designing the tool and in the assessment itself. Participants should understand the OCA methodology and process and the necessary commitments. Facilitators should encourage all attendees to actively participate and listen. Facilitators also should make space for more timid participants, including those who may be in subordinate roles, and be especially attuned to any excessive or restrained participation because of cultural norms around wealth, gender, age, formal education, and hierarchy or seniority in the organization.

Note that participants often grasp concepts more easily when examples are contextualized. And because people process information at different rates, make space for reflection, ask clarifying questions, and use silence as a motivation for creative brainstorming and participation by all attendees; it can be useful to give participants paper to write down their ideas during times of silent reflection. Also, pay close attention to and use the variety of facilitation techniques outlined throughout this handbook.

Section Break (Next Page)

## Phase 1: OCA Cohort and Process Solidified

# Best practices for elements



# What are elements?

Anything that is not text:

- Figures
- Graphics
- Text boxes
- Photographs
  
- Tables



# Maximizing spacing around elements (1)

AutoSave Off English (United) training example Rachel Elrom

File Home Insert Layout Design Draw Developer References Review View **Shape Format** Comments Editing Share

Insert Shapes Shape Styles WordArt Styles Text Accessibility Arrange Size

Shape Fill Shape Outline Shape Effects Quick Styles Text Direction Align Text Create Link Alt Text Position Wrap Text Bring Forward Send Backward Selection Pane Size 1.9" 2.56"

Layout

Position Text Wrapping **Size**

Wrapping style

In line with text Square Tight Through Top and bottom Behind text In front of text

Wrap text

Both sides  Left only  Right only  Largest only

Distance from text

Top 0" Left 0.1" Bottom 0" Right 0.1"

OK Cancel

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Page 1 of 2 98 words English (United States) Text Predictions: Off Display Settings Focus 90%

# 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

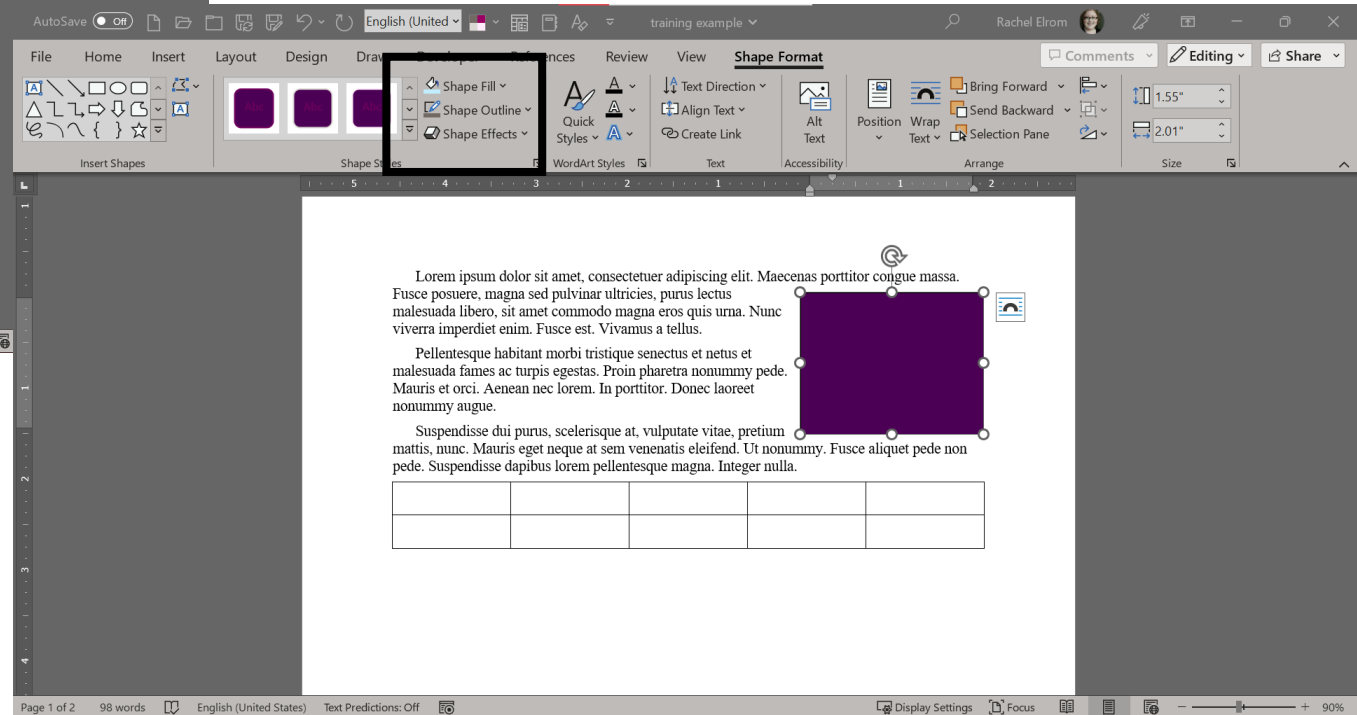
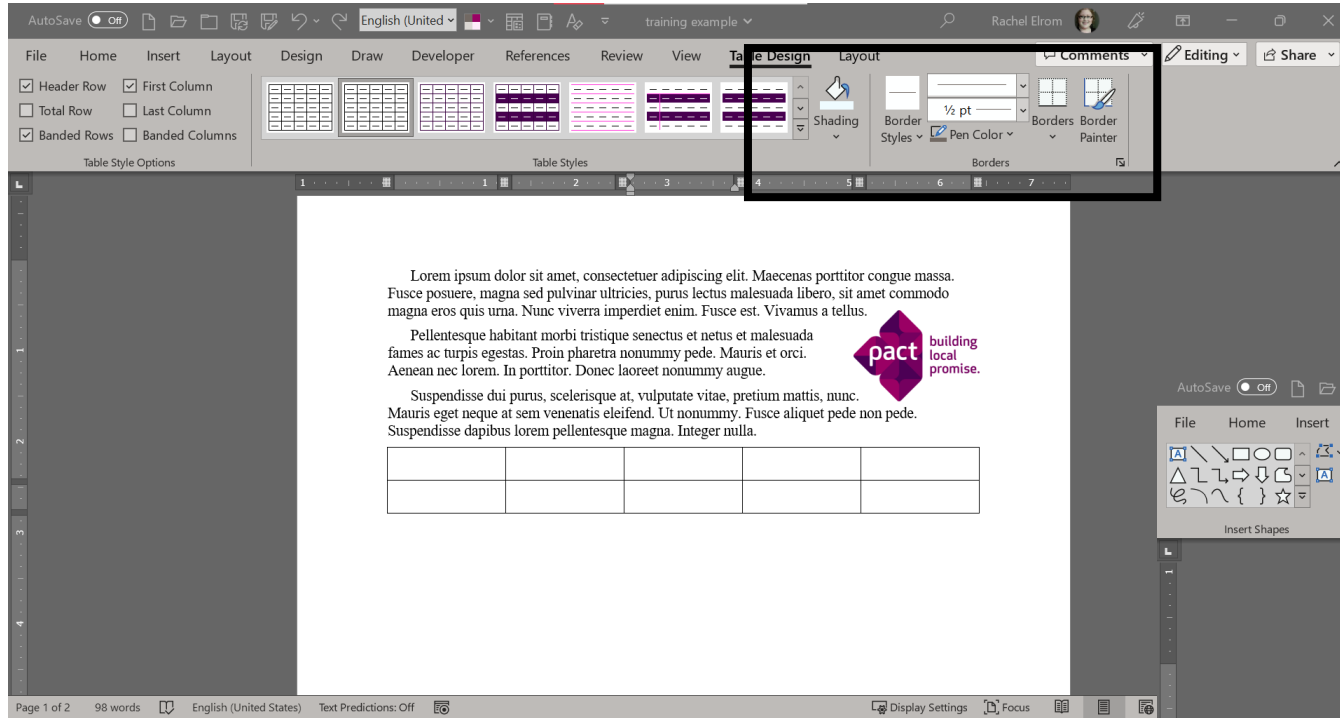
# What about tables?

The screenshot displays the Microsoft Word interface with the 'Layout' ribbon selected. The 'Table' group on the ribbon includes options like 'View Gridlines', 'Properties', 'Draw Table', and 'Eraser'. The 'Rows & Columns' group features 'Delete', 'Insert Above', 'Insert Below', 'Insert Left', and 'Insert Right'. The 'Merge' group has 'Merge Cells', 'Split Cells', and 'Split Table'. The 'Cell Size' group shows 'AutoFit', height (0.4"), and width (1.3") settings. The 'Distribute' group includes 'Distribute Rows' and 'Distribute Columns'. The 'Text' group has 'Text Direction' and 'Margins'. The 'Cell' group includes 'Repeat Header Rows', 'Convert to Text', and 'Formula'. The 'Data' group is also visible.

Two dialog boxes are open: 'Table Options' and 'Table Properties'. The 'Table Options' dialog is on the left, showing 'Default cell margins' (Top: 0", Bottom: 0", Left: 0.08", Right: 0.08"), 'Default cell spacing' (Allow spacing between cells: unchecked, 0"), and 'Options' (Automatically resize to fit contents: checked). The 'Table Properties' dialog is on the right, showing 'Table' tab, 'Size' (Preferred width: 0", Measure in: Inches), 'Alignment' (Left, Center, Right), 'Text wrapping' (None, Around), and 'Positioning...'. The 'Options...' button in the 'Table Properties' dialog is highlighted with a black arrow.

The main document content includes three paragraphs of Lorem Ipsum text and a table with 4 columns and 2 rows.


# Adding color to tables and text boxes



Questions?

