Taskforce Engagement Planning

Guide for creating on-brand presentations | FY 2019

Keep it simple.

When in doubt, leave it out.

st practices for presentation design

- Iake an outline first.
- Jse powerful images.
- nclude only one idea per slide.
- Jse slides for emphasis, not exposition.
- sk great questions.

Public Engagement

The purpose of this document is to share options for public engagement by the Taskforce and to clear the approach with senior Bureau leaders.

Request for Information (February-June)	Non-Public Listening Sessions (March)
GOAL: The simplest way for Taskforce members to obtain input from the public is by issuing an RFI through the OMB. Members are aware this process can take time, so they intend to have a list of questions set by late February (with a goal to release by late March). **NOTES:** The Taskforce RFI will not be general, but rather specific and targeted (without triggering PRA). RFI will not be duplicative of call for evidence inquiries. It will focus on areas that went unexplained in the call for evidence or it will look towards the future (i.e. AI, FinTech, etc.).	**GOAL**: The Taskforce would like to arrange for a time to engage with consumer and industry groups as well as academics and economist. The purpose of these meetings would provide an opportunity for the Taskforce to hear directly from these groups in a controlled environment. **NOTES:** A single roundtable will be hosted with each of these groups in attendance. The discussion will be limited to 2-4 topics that the Taskforce Members are particularly interested in hearing additional points of view.

Plans to engage with the advisory committees in March and the public during consumer wellness week in June were impacted by the Coronavirus pandemic.

Public Engagement

The purpose of this document is to share options for public engagement by the Taskforce and to clear the approach with senior Bureau leaders.

Public Research (May-June)	Public Hearing (Late June / Early July)	Advisory Committee Meetings (Late June / Early July)	Individual Meetings (July-September)
GOAL: Pull publicly available information from Bureau partners' websites on the topic of each chapter of Volume 1. The purpose is to ensure that view points of trade and consumer groups are understood even if these organizations were unable to provide full responses to the RFI due to disruptions caused by COVID-19. **NOTES:** The Taskforce support team will conduct targeted research of publications from trade and consumer groups, and provide summaries of these viewpoints to the Taskforce members.	**GOAL:** The Taskforce members would like to host a 60 minute public call to solicit feedback on topics relevant to the Taskforce. The team will repurpose the March 10 Listening Session discussion prompts, but include some limited insights in feedback received from the RFI. **NOTES:** This meeting is schedule at the same time the Taskforce will be pivoting from analysis to developing recommendations. It will also be shortly after the RFI comment window closes. The members can use this hearing to share some of the feedback that has been received and to glean insights into how feedback could lead to potential recommendations.	**GOAL:** The Taskforce members would like to host a 90 minute call with the Advisory Committee Meetings to provide feedback on feedback received from the RFI, research, and Public Hearing. **NOTES:** This meeting is schedule at the same time the Taskforce will be pivoting from analysis to developing recommendations. It will also be shortly after the RFI comment window closes. The members can use this hearing to share some of the feedback that has been received and to glean insights into how feedback could lead to potential recommendations.	**GOAL:** If the Taskforce members feel there are gaps in information needed to develop recommendations on any specific area of Consumer Financial Law, then the team may choose to close those gaps via meetings with key stakeholders. **NOTES:** This topic is still under consideration, but a plan has been developed and is under review as of May 1.

Cons
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sign principles for presentations

Edit your slides down to the essentials.

Give the logo space to breathe.

Use images, rather than text, to simplify complex ideas.

Don’t overfill your slides. White space is a good thing.

Use title case for only proper nouns; otherwise use sentence case.

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lit down to the essentials.

ıve the logo space to breathe.

ɜe images, rather than text, to simplify complex eas.

clude only one idea per slide.

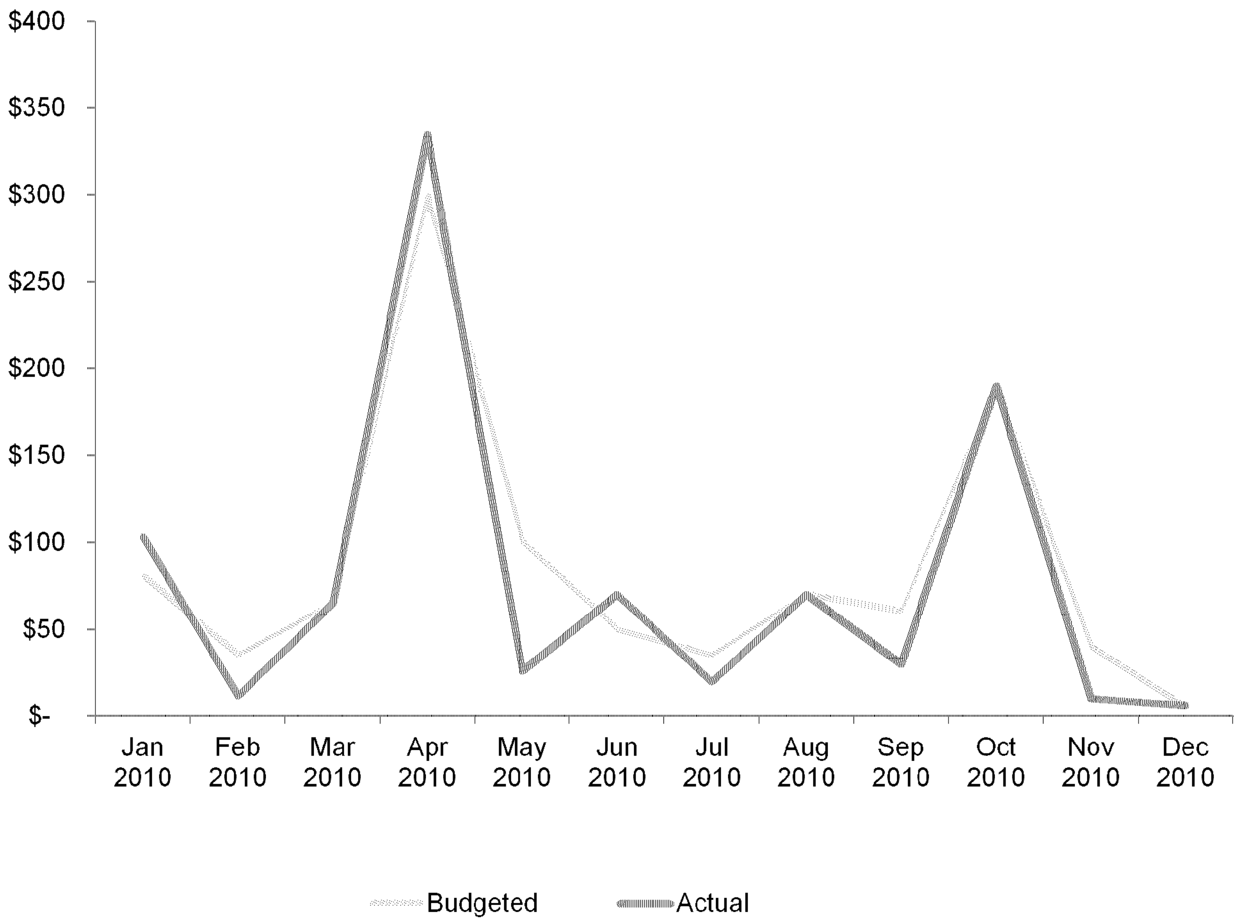
ʼeate an outline first.

ide titles should be concise.

Don’t do this

- Don’t overfill your slides.
- Don’t overlap the logo with content.
- Don’t use colors that are not in the Bureau’s color theme.
- Don’t use non Bureau fonts.
- Don’t make text too small.

is is an example of a line graph



Check out the Excel data samples within the desi
toolkit for commonly used charts, graphs, tables,

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ve the logo room to breathe

here should always be ample space around the logo to ensure maximum impact and keep
ark from looking cluttered.

Consumer Financial Protection Bureau

Consumer Financial Protection Bureau

ımary color palette

'he primary color palette is green and black, including mid-tones and tints and a thoughtfu
.se of whitespace.

Brand Green
R 32
G 170
B 63

Green 60
R 173
G 220
B 145

Green 20
R 226
G 239
B 216

Black
R 16
G 24
B 32

Gray
R 90
G 93
B 97

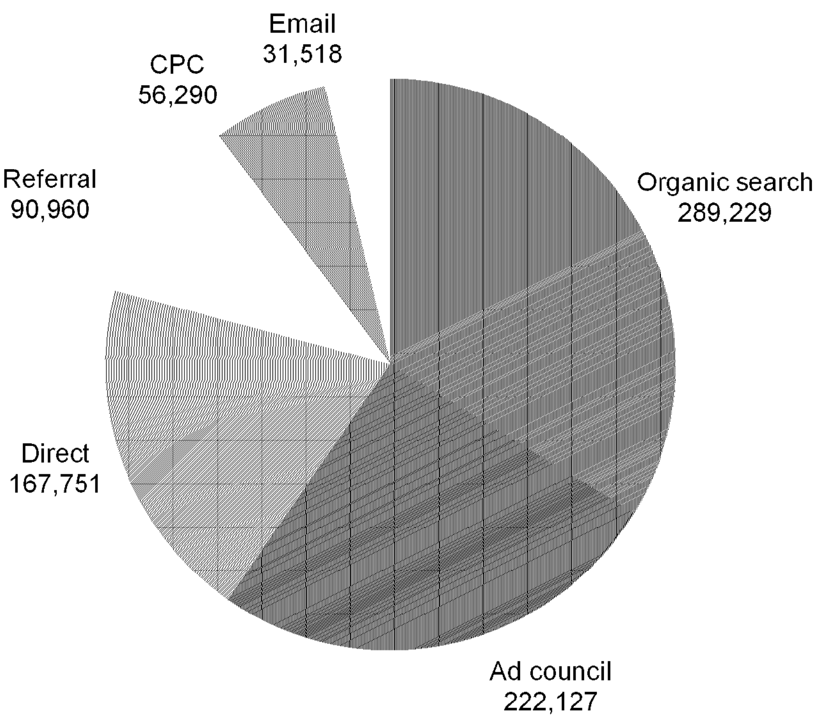
Gray 10
R 231
G 231
B 233

[cropped]lpful resources

[cropped]he Design Manual

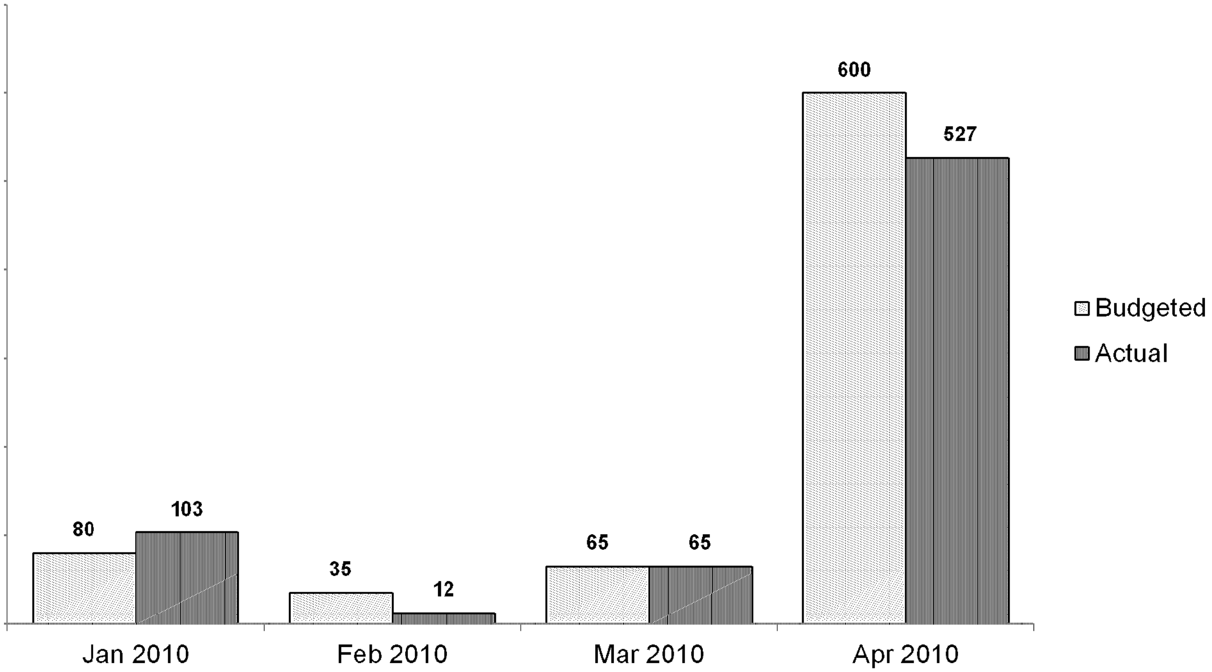
- Logo standards
- Color principles
- Typography
- Minicon usage
- Photography standards

is is an example of a pie chart with description text



Check out the Excel data samples within the desi
toolkit for commonly used charts, graphs, tables,

is is an example of a bar chart with description text



Check out the Excel data samples within the desi
toolkit for commonly used charts, graphs, tables,

ıding based on types of payment, 2012

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ce: Technology & Innovation, 2012

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ce: Technology & Innovation, 2012

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ɔw to use minicons

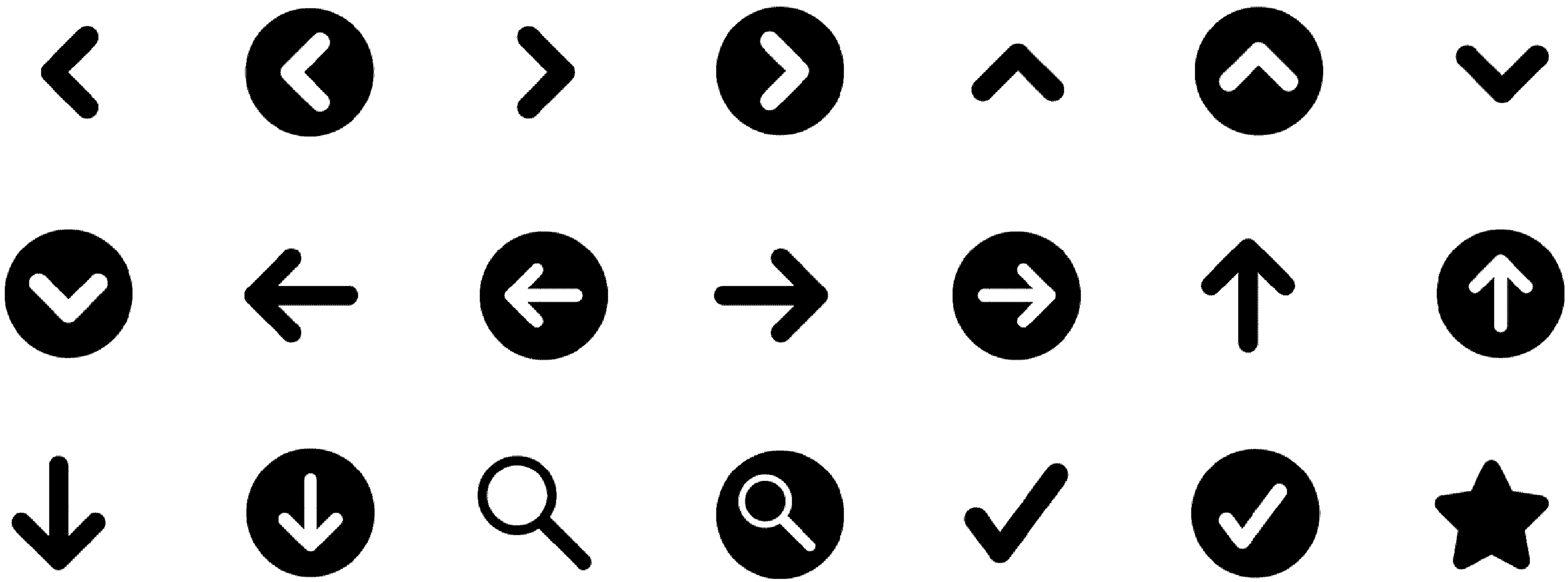
ı minicon should never stand alone. It should always appear with descriptive text.

ı minicon's size should never be larger than 1 inch.

Ⅎinicons should always be one color.

'or more details visit the Design Manual.

ow to use minicons



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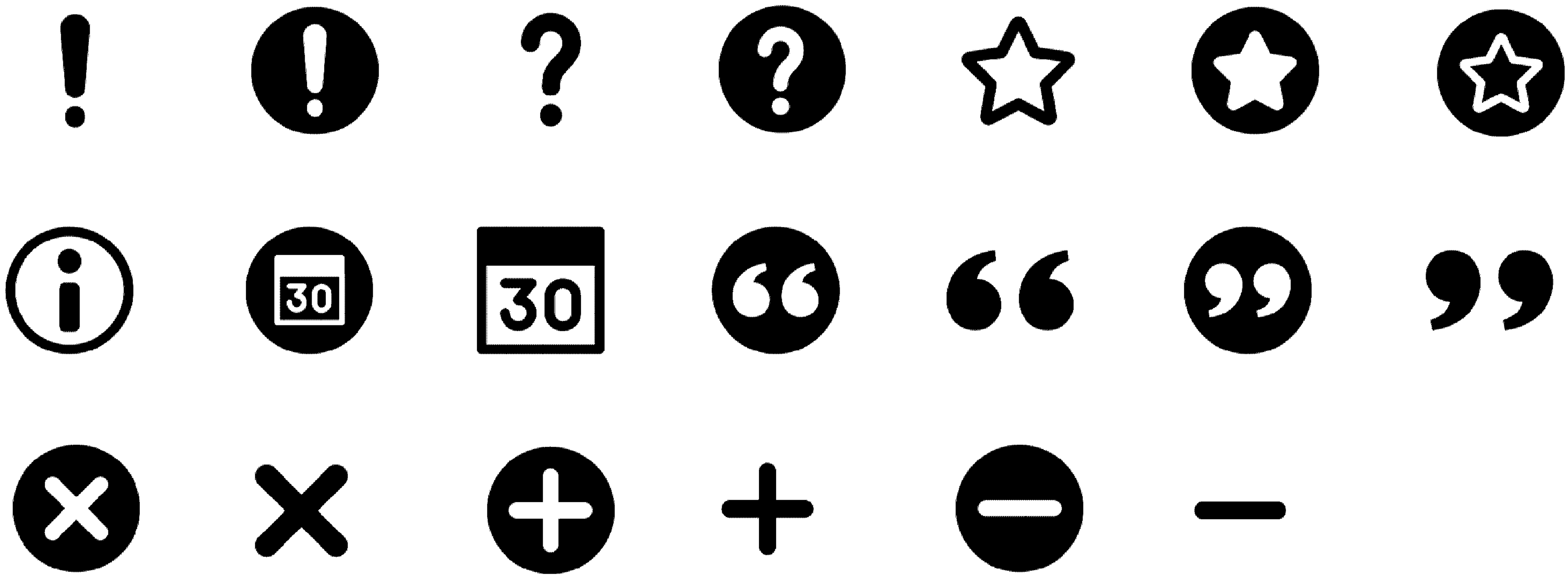
nicons to use as needed



is is an example of a two-line header, if needed.
e recommend keeping slide titles to one line.

Thank you for using this template.

The latest version of this document can be found in the design toolkit within Design & Brand on the intranet. If you have improvements or suggestions, please let us know at design@cfpb.gov.