Terms of Reference
Advance Excel Training

Background
Recognizing the pivotal role of proficient proposal and report writing skills in articulating ideas, securing projects, and ensuring transparent communication, the Karen Teacher Working Group (PARTNER) is intensely aware of the need to enhance the capabilities of staff in this area.

In today's data-driven environment, advanced Excel skills are crucial for efficient data analysis, management, and presentation. This Terms of Reference outlines the objectives and framework for providing advanced Excel training to enhance the skills of PARTNER database team and program leaders.

Objectives
The primary objective of this training is to:

- Equip 25 participants with advanced Excel skills that will enable them to analyze complex datasets effectively.
- Improve participants' ability to automate tasks and streamline processes within Excel.
- Facilitate a deeper understanding of Excel's functionalities that can be applied to real-world scenarios.

Scope of Work

1. Needs Assessment and Participant Analysis.
   Pre-Training Assessment: Conduct surveys or assessments before the training to determine participants' existing Excel knowledge and specific learning needs.
   Customizing Content: Tailor the training content based on the assessment results, ensuring it meets the needs of the participants and aligns with their job roles.
2. Use of Visual Aids and Resources
   Presentation Slides: Utilize engaging visual presentations to explain concepts clearly and effectively.
   Documentation: Distribute printed materials, handouts, or digital resources that summarize key topics and provide step-by-step instructions for later reference.
3. Feedback and Reinforcement
   Immediate Feedback: Facilitate sessions where participants can ask questions and receive immediate feedback on their understanding of the topics.
   Quizzes and Assessments: Implement quizzes or mini-assessments at the end of each session to reinforce learning outcomes and gauge understanding.
4. Post-Training Support
   Follow-Up Resources: Provide participants with additional resources, such as video tutorials or online forums, for continued learning after the

training.

Feedback Collection: Gather participant feedback on the training experience to understand its effectiveness and identify areas for improvement.

Ongoing Support: Offer avenues for participants to seek help or clarification on advanced Excel topics post-training.

5. Evaluation and Reporting

Evaluation of Learning Outcomes: Analyze participant performance in assessments and practical exercises to evaluate the effectiveness of the training.

Final Report: Provide a comprehensive report summarizing the training activities, participant feedback, areas of improvement, and recommendations for future training sessions.

The following topics will be covered during the Advanced Excel Training:

1. **Advanced Formulas and Functions:**
   - Nested functions
   - Array formulas
   - Logical functions (IF, AND, OR)
   - Lookup functions (VLOOKUP, HLOOKUP, INDEX, MATCH)
2. **Data Validation and Conditional Formatting:**
   - Creating and managing data validation rules
   - Using conditional formatting to visualize data trends
3. **PivotTables and PivotCharts:**
   - Creating and manipulating PivotTables
   - Analyzing and summarizing data with PivotCharts
4. **Data Analysis Tools:**
   - Scenario Manager
   - Data Tables
   - Goal Seek and Solver add-in
5. **Advanced Charting Techniques:**
   - Creating complex charts (combination charts, sparklines)
   - Chart formatting and customization
6. **Macros and Automation:**
   - Introduction to macros
   - Recording and editing macros
   - Basic VBA concepts for automation
7. **Data Import and Export:**
   - Importing data from external sources (CSV, TXT, databases)
   - Exporting to various formats
8. **Collaboration and Sharing:**
   - Protecting and sharing workbooks
   - Using Excel Online and co-authoring features
9. **Case Studies and Practical Exercises:**
   - Real-world applications of advanced Excel techniques
   - Hands-on exercises to reinforce learning

Location and Official Travel Involved

- All communication and meeting through online platform with PARTNER. Work from home situation and using with own IT equipment.
- However, there might no need to require travel to partners' location recommended by **online** section.
- All information must be confidential relating with PARTNER.

Consultancy Timeline

This is approximately 3-month contract with the consultancy group/ consultant.
The details of dates and plans are negotiable. At least, 40 hrs training schedule within contract period and online section only.

Estimated Timeline: Mid of the January 2025 – March 2025

Payment Conditions

- Any revenue occurring in Thailand is subject to withholding tax. If you are a Thai citizen, and or having a Thai work permit and or residing for over 180 days, then a 3% withholding tax will be applied.
- If not, a 15% withholding tax will be applied for a non-Thai citizen, residing in Thailand less than 180 days.
- If you are using an international bank account (apart from Thai and Myanmar), no withholding tax deduction will be applied, and you will be responsible for any applicable tax in your own country.
- Any transfer from USD to THB and or MMK will use the exchange rate from our system on the transfer date.

THB exchange rate from Jan-Sep 2024	MMK exchange rate from Jan-Sep 2024
Min = 34.02	Min = 3,371.64
Max = 37.02	Max = 4,275
Average = 35.93	Average = 3,713.11

Application Process:
- Email should be addressed to **Supply Chain Team** at THA_Procurement_BKK@savethechildren.org not later than **18 September 2024 at 5:00 pm.** Late submissions will not be considered. Therefore, do not send tender related questions to this email address as they will not be answered.
- Note – this is a sealed tender box which will not be opened until the tender has closed. Therefore, do not send tender related questions to this email address as they will not be answered.
- The subject of the email should be **"Advance Excel Training"**.
- All questions relating to the tender should be sent via email to: Arunrat Wattanapalin at arunrat.wattanapalin@savethechildren.org
- Please be advised local working hours are **08:30 am - 05:30 pm.** Please allow up to **3 working days** for a response.