

TERMS OF REFERENCE:

Provision of Learning Service Provider for the Conduct of the Training Program on Advanced Microsoft Excel and PowerPoint

I. Background

Success in today's office-based environment is assessed on the basis of computer literacy. Among the necessary computing skills, having the right grasp of MS Office is even more vital. Being proficient in this set of tools is highly valued as it enhances productivity, supports effective data handling, and improves communication and presentation skills.

TIEZA, as the Department of Tourism's implementing arm in providing support infrastructures and facilitating investments in tourism enterprise zones (TEZ) nationwide in the Philippines. It is carried out through its main functions — infrastructure development; designation, regulation and supervision of TEZs; management of its existing assets or facilitation of their privatization; and administration of the collection of the Philippine Travel Tax.

As such, support to its mandate and functions, as well as to ensure efficiency in its internal operations, TIEZA relies to its employees' competencies – both technical and not, including effective use of available software programs in a variety of settings and situations.

II. Objectives

The objective of the engagement is to deliver a two-day training program per office application to twenty-five pre-identified TIEZA employee whose function include creating presentations and making spreadsheets. It aims to help the participants become compelling and assertive users of the applications. The course design shall include, but not limited to the following modules:

1. Advanced MS Excel (16 hours)

MODULE 1: DATA REFERENCE

- Introduction to Excel Spreadsheet intermediate level
- Defining names in Excel

MODULE 2: PERFORMING CALCULATIONS

- Cell Referencing and Request
- Create basic formulas
- Calculate with functions
- Copy Formulas and Functions
- Auto Sum and Auto Fill Function

MODULE 3: USING FUNCTIONS

- Functions within Excel
- Information functions

- Using Text to Columns
- Understanding Date Function
- Database Functions

MODULE 4: MODIFYING A WORKSHEET

- Manipulate data
- Insert and Delete Cells, Columns, and Rows
- Search for Data in a Worksheet
- Understanding worksheets
- Editing, copying and moving cells

MODULE 5: FORMATTING A WORKSHEET

- Modify fonts
- Add Borders and Color to Cells
- Change Column Width and Row Height
- Position cell contents
- Apply cell styles
- Selecting cells
- Formatting cells
- Formatting numbers
- Placing cell alignment

MODULE 6: CREATING CHARTS AND DASHBOARDS

- Understand charts
- Chart design options and tools
- Chart format tools
- Combo charts

MODULE 7: DATA CONSOLIDATION

- Sorting data
- Using Excel tables
- Filtering data in Excel

MODULE 8: MANAGING EXCEL CONTENT

- Find and Replace
- Headers and Footers
- Adding comments
- The Paste special function
- Conditional Formatting
- Formula auditing and error tracing

MODULE 9: MANAGING LARGE WORKBOOKS

- Opening and closing workbooks
- Understanding workbook file formats
- Creating new workbooks
- Format worksheet tabs
- Manage worksheets in a workbook

- Manage the view of large worksheets

MODULE 10: PRINTING WORKBOOK CONTENTS

- Page layouts in Excel
- Print workbook contents using default print options
- Set print options
- Set page breaks
- Spell check a worksheet

2. MS PowerPoint (16 hours)

Module 1: USING AUTOLAYOUT

- Choosing an Auto Layout
- The Title Slide
- Bulleted List
- Table Organization Chart
- Chart Slide
- Text and ClipArt

MODULE 2: CREATING AND RUNNING A SLIDE SHOW

- What is a Slide Show?
- Navigating Through a Slide Show
- Slide Show Transitions and Timings
- Set Timings for a Slide Show
- Running a Slide Show
- Slide Show Annotations
- Hidden Slides
- Animation Effects
- Meeting Minder
- Slide Show Shortcuts

MODULE 3: USING MASTERS

- What Are Templates and Slide Masters?
- Creating a New Template Adding a Footer
- Date and Numbering Information Manipulating Slide Masters

MODULE 4: PRINTING A PRESENTATION

- Printing under PowerPoint
- Setting Up Slides for Printing
- Printing a Presentation

MODULE 5: ADDING AND MODIFYING OBJECTS

- Tables and Text Manipulation
- Selection Techniques within Tables
- Manipulating Cells, Rows, Columns within Tables
- Creating a Chart
- Chart Types and Chart Titles
- Chart Sections
- Chart Legend and Chart Data Labels

- Chart Data Table
- Manipulating the Chart
- Formatting the Data Series
- Creating an Organization Chart
- Adding or Removing Chart Boxes
- Moving Chart Boxes
- Formatting Organization Chart Boxes

MODULE 6: ENHANCING IMAGES

- Refine images in PowerPoint
- Navigate the Format Picture Pane (background removal, color corrections, and recoloring)
- Apply styles, effects, and artistic transformations to images
- Image optimization - cropping for impactful presentations

MODULE 7: ANIMATIONS & TRANSITIONS

- Basics of animation, exploring techniques for animating text, objects, and even intricate SmartArt Graphics
- Advanced animation concepts, like applying multiple effects, using motion paths, and precisely setting timings through the Animation Pane
- Understand the art of slide transitions, ensuring smooth flow between slides

MODULE 8: POWERPOINT AND OTHER FILES AND APPLICATIONS

- Pasting Objects from Other Applications
- Resizing and Embedded Object
- Editing and Embedded Object
- Embedding an Object
- Using Insert Object
- The Links Command Multimedia
- Inserting online videos and audio, along with essential formatting and editing techniques
- Media optimization and the use of action buttons for enhanced interactivity

III. Minimum Qualifications of the Learning Service Provider

1. Must be accredited by the Civil Service Commission as a Learning and Development Institution (CSC ALDI), as evidenced by submitting the certificate or resolution issued by the Commission.
2. MUST be a licensed/ certified Microsoft Office trainer (s)
3. Must have a strong track record in Microsoft training or facilitation, as demonstrated by certificates of satisfactory project completion from at least five (5) clients.
4. Demonstrated proven track record with a reputable client base, supported by documented proof of contract completion from at least five (5) different clients within the past five (5) years, including one (1) government agency.

IV. Deliverables

1. Prepare a course design setting out the course learning outcomes, delivery strategy and course schedule. The course design should include lecture and hands-on exercises;

2. Prepare equipment and provide participants with training kits and softcopy of the presentation materials. Advance copy of presentation materials should be provided to ADSD-Learning and Development Team;
3. Conduct pre- and post-program competency assessment of participants against the learning objectives of the program;
4. Conduct and facilitate the program at a TIEZA designated function room on:
 - Advanced MS Excel: 2 days (16 hours) on August 14-15, 2024; and
 - Advanced MS PPT: 2 days (16 hours) on August 21-22, 2024
5. Administer post-program evaluation survey to participants;
6. Issue certificates to the participants upon completion of the program; and
7. Submit a terminal report on the course delivery and administration, individual pre and post-test competency assessments, course feedback from participants, analyses of issues, and recommendations.

V. Training Duration and Venue

The two programs shall be held at the Multi-Purpose Hall B on the following schedules:

Advanced MS Excel: 2 days (16 hours) on August 14-15, 2024
 Advanced MS PPT: 2 days (16 hours) on August 19-20, 2024

VI. Budget and Payment


The approved budget for the contract (MS Excel and MS PPT) IS **TWO HUNDRED FIFTY THOUSAND PESOS (250,000.00)**, inclusive of all applicable government taxes and service charges.

This shall cover payment for program design, diagnostics, program execution for facilitators, participants' manuals/ training materials, evaluation reports, and other deliverables mentioned above.

VII. Force Majeure, Liquidated Damages and Termination.

The incidents on force majeure and/or liquidated damages and/or contract termination shall likewise be governed by the provisions under R.A. No. 9184 and other relevant rules and issuances.

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