

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: Structured References

Explore the power of structured references in Excel, which streamline data management and formula creation. This topic covers the essentials of utilizing cell-based and table-based references, understanding table elements, and manipulating data through structured references for rows, ranges, totals, and the use of the union operator. Ideal for enhancing accuracy and efficiency in data handling.

MODULE 2: Named Ranges

Dive into the versatility of named ranges to simplify formula creation and data navigation. Learn how to create, apply, edit, and manage named ranges, including innovative techniques using the Name Box and selection-based range creation. This section also covers how named ranges can be utilized in formulas, data validation, and for organizational efficiency.

MODULE 3: Dynamic Array Functions

Uncover the functionality of dynamic array functions such as UNIQUE, SORT, FILTER, and CHOOSECOLS. This topic emphasizes the ability to manage large datasets effectively, perform dynamic sorting and filtering, and manipulate data arrays in sophisticated ways that respond to data changes in real-time

MODULE 4: Lookup: Index Match

Master the powerful combination of INDEX and MATCH functions for advanced lookup capabilities. This section explains how to leverage these functions for more flexible and powerful data retrieval options than traditional lookup functions, including data validation techniques and error handling.

MODULE 5: Lookup: Choose Switch XLookup

Gain insights into advanced lookup strategies with CHOOSE, SWITCH, and XLOOKUP functions. This topic introduces methods for conditional operations, exact and approximate matches, and pulling data from multiple datasets, providing a robust toolkit for complex data analysis scenarios.

MODULE 6: Pivot Tables

Enhance data summarization skills with PivotTables, exploring creation, customization, and advanced data analysis techniques. Learn about extracting data, filtering, changing calculations, and using PivotCharts and slicers to present data effectively. This topic also covers timeline filters, grouping data, and optimizing report layouts for impactful data presentation.

MODULE 7: Advanced Functions

Expand expertise with advanced Excel functions across categories like date, information, math, statistics, and optional text functions. This comprehensive overview includes practical applications of NETWORKDAYS, SUMIFS, COUNTIFS, and innovative ways to handle and analyze data to drive decision-making.

MODULE 8: Open Power Query

- Open Power Query
- Configure Power Query
- Add Power Pivot
- Modify the Quick Access Toolbar
- Configure Power Query

MODULE 9: Get Data

- Import Data from the following: CSV File Excel, Table, List, Pivoted data. Folder, PDF File
- Type in the Data
- Load the Data to Excel

MODULE 10: Exporting and importing

- Exporting and importing text files
- Exporting and importing XML data
- Getting external data

MODULE 11: Analytical Tools and Scenarios

- Goal Seek and Solver
- The ToolPak
- Using Scenarios

MODULE 12: Macros

- Using Macros
- Working with VBA code
- Creating Functions

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 MODFYING 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

- Training institution must satisfy at least one (1) of the following by submission of corresponding accreditation/certification/recognition:
 - Accredited by the Civil Service Commission (CSC) as a Learning and Development Institution (ALDI).
 - Accredited by the Philippine Regulatory Commission (PRC) as a Continuing Professional Development (CPD) Provider in any field

- Recognized by the Commission on Higher Education (CHED) as a Center of Excellence (COE) or Center of Development (COD).
- Holder of accreditation, awards, or recognition from international or local bodies that certify the institution's excellence in delivering training programs that meet international or local standards.
- Training institution must have a strong track record in Microsoft training or facilitation, as demonstrated by certificates of satisfactory project completion from at least three (3) clients.
- Facilitator must be a licensed/ certified Microsoft Office trainer (s) as evidenced by the submission of appropriate licensure/ certification.

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. Administer post-program evaluation survey to participants;
5. Issue certificates to the participants upon completion of the program; and
6. 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 November 18-19, 2024

Advanced MS PPT: 2 days (16 hours) on November 20-21, 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. Reserved Rights on the Use of the Outputs/Deliverables

All concepts and original materials formulated and designed in conjunction with this program shall be owned by the TIEZA with full and exclusive rights on future use thereof both in the Philippines and internationally.

VIII. Dispute Agreement/Resolution

Should any dispute related to the Contract and/or rights of TIEZA and the selected Learning Service Provider as parties of this Contract arise, the same shall be submitted to mutual consultation, mediation, and arbitration, in the order of application.


The venue of the proceedings shall be in Pasay City. In case of a court suit, the venue shall be the courts of competent jurisdiction in Pasay City, to the exclusion of all other courts.

Any amendment or additional terms and conditions to the Contract must be in writing, signed and acknowledged by the Parties.


IX. 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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