

## TERMS OF REFERENCE

### CONSULTANCY TO DELIVER IN-PERSON BASIC EXCEL TRAINING

for

#### Uganda Wildlife Authority (UWA) Staff in Entebbe, Uganda

##### Background:

Wildlife Conservation Society (WCS) is seeking proposals from qualified Microsoft accredited consultants to provide hands-on, instructor-led Basic Microsoft Excel introduction training for 25-30 UWA staff under the USAID/Uganda Combating Wildlife Crime Activity (CWC) Activity. The associated logistics including venue, meals, and computers required to deliver the training will be provided by WCS.

This training aims to equip UWA rangers with basic knowledge in the use of MS Excel computer software as a support tool in data capture, storage, analysis, and reporting. The training will provide skills and knowledge that will allow the attendee to learn basic functionalities of MS Excel such as file creation, workbook management, use of in-built analytical tools e.g., Lookup, insert Formulas, create tables, graphs, and export XLS and CSV files to other software such as ArcGIS among others. In addition, learn to perform advanced data operations using summarizing, pivot tables, data consolidations, goal seeking (what if analysis or logical queries), and create and use macros.

Specifically, the consultant will be expected to effectively deliver the following content in an engaging, interesting, and participatory fashion suitable for adult learners.

1. Opening and saving Excel files and workbooks for future reference and use.
2. Create Lookup and reference functions.
3. Customize the formatting of charts in Excel.
4. Create and use labels and names in a workbook.
5. Protect data in worksheets and workbooks for safety and third-party access and manipulation of data.
6. Create summaries in spreadsheets, of subtotals, calculate an average, finding minimum value and common error messages.
7. Use data linking to create more efficient workbooks. This will help trainees learn how to link the worksheet to the source worksheet so that any changes in values are automatically updated in the Word document.
8. Use the data consolidation feature to combine data from several workbooks into one.
9. Use Filters and advanced Filters in given data sets and criteria.
10. Generate/create simple Pivot Table reports, using data obtained during executing their duties.
11. Construct and operate PivotTables and implement a quick dashboard analysis.
12. Create and edit a PivotChart.
13. Use the formula functions.
14. Use goal-seeking to determine the values required to reach a desired result, especially in performing sensitivity analysis in financial modeling in line with their work.
15. Group cells and use outlines to manipulate the worksheet.
16. Use Solver to solve more complex and intricate problems in the range of data available.
17. Design a reusable data entry template that protects formulas.
18. Export and import Excel or CSV files to, and from other software e.g., ArcGIS.
19. Any other basic or advanced content that may be relevant to the participants improving their proficiency in MS Excel.

### **Deliverables:**

Trainer (s) will provide;

1. Soft copies of reference materials or links to recommended online resources covering the course content.
2. Open-source self-help illustration videos/ tutorials for future use, where necessary.
3. Participants' certificate of completion/recognition.
4. 3-day in-person hands-on training between 22<sup>nd</sup> to 30<sup>th</sup> January 2024 (the exact days to be agreed upon).

### **Expected results:**

At the end of the training, participants will be able to;

1. Effectively use MS Excel spreadsheet to enter data, analyze and generate relevant reports for their supervisors.
2. Use the knowledge and skills gained to improve their general performance.

### **Description of tasks:**

The trainer (s) are expected to:

1. Prepare a hands-on training course outline and deliver a 3-day training to around 25-30 participants in Entebbe, Uganda.
2. Cover the MS Excel content above.
3. The training is expected to be given in English, but illustrations with local examples in Swahili will be an added delivery advantage.
4. Prepare all training materials (PowerPoint presentation, pre and post-assessment, handouts, etc.) for the participants.
5. Prepare the final report of the training for WCS.

### **Qualifications:**

WCS is ideally looking for a national consultant/consultant team or institution or trainer (s) with the following credentials:

1. MUST be a credited Microsoft trainer (s).
2. MUST be compliant with the required TAX regulations and other legal frameworks for Uganda.
3. A good track record of past MS Microsoft training or facilitation for adult learners.
4. Excellent facilitation and presentation skills for adult audiences.
5. A good command of English as the main language of instruction. The Swahili language will be an added advantage.
6. Must be ready to work on public holidays and/or weekends.

**Interested parties** should **submit** their technical and financial proposals in PDF format to [wcsuganda@wcs.org](mailto:wcsuganda@wcs.org), specifying "Basic Microsoft Excel Training" in the subject line **by December 12, 2023**.