

## Terms of Reference for advanced Microsoft office training service

March 2023

Oxfam is a global movement of people who are fighting inequality to end poverty and injustice. There are currently 21 member organizations working in 87 countries. We have a vision of a just and sustainable world. A world where people and the planet are at the center of our economy. Where women and girls live free from violence and discrimination. Where the climate crisis is contained. And where governance systems are inclusive and allow for those in power to be held to account.

Oxfam in Vietnam believes that a reduction in poverty, injustice, and inequality will occur through the interaction between active citizens, accountable states and responsible private sector and that it is fundamental to Vietnam's development. Oxfam in Vietnam aims to influence the current growth-based development model to shift to a Human Economy Development Model, putting people and the planet before profits.

### 1. Background and rationale

Over the past two decades, non-profit organizations (NPOs), and social organizations have increased in quantity and quality, with diverse types and meaningful contributions to development. Social organizations, non-state and nonprofit actors respond to the needs of vulnerable groups, towards a more equal society and narrowing the gap between divergent groups in society. NPOs' financial sustainability based on financial compliance and autonomy is important for them to play the above role.

Oxfam operates in a dynamic environment that is characterized by partnership building with many international donors, as well as other local organizations. This is coupled with the continued expectation that Oxfam upholds its integral values of accountability and transparency. The approach to address these increasingly complex and changing needs is to adopt strategies and processes and develop them in such a way that the Oxfam and its partners can form strong mutual partnerships.

As an international organization responding to a rapidly evolving environment, the use of data is becoming increasingly important for Oxfam, to inform both the day-to-day and strategic decisions that affect the work operations within the organization. In line with this mandate, Oxfam is looking for a competent firm to provide training services for its staff in Advanced and Intermediate Microsoft office applications.

### 2. Objective and expected outputs

**Objective:** The training service package helps increased understanding and capacity to perform complex tasks for daily work of Oxfam staff

**Target participants:** BO team (required), others staff (optional)

**Expected deliverables:**

1. Develop a training plan for implementing the planned training
2. Conduct training in Advanced Microsoft office with the designed training module and training plan in Oxfam office 22, Le Dai Hanh, Hai Ba Trung, Ha Noi,
3. The Consultant should design a detailed training program covering the following

Excel	<ul style="list-style-type: none"><li>▪ Worksheet management – comparing/moving/copying</li><li>▪ Conditional Formatting</li><li>▪ Linking excel data</li><li>▪ Paste Specials</li></ul>
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	<ul style="list-style-type: none"> <li>▪ Working with Formulas (SumIF, CountIF, CountA)</li> <li>▪ Working with Date and Time Functions</li> <li>▪ Sorting Data</li> <li>▪ Filters &amp; Advanced Filters</li> <li>▪ Creating sub-totals</li> <li>▪ IF and nested IF Functions</li> <li>▪ V Lookups &amp; H Lookups</li> <li>▪ Creating and Formatting Charts</li> <li>▪ Pivot Tables</li> <li>▪ Creating Tables in Excel</li> <li>▪ Advanced formulas and functions (Database Functions; Text Functions; Lookup, Index and Match; Array Formula)</li> <li>▪ Advanced List management</li> <li>▪ Importing &amp; Exporting Data</li> <li>▪ What-If Analysis</li> <li>▪ Spreadsheet Security</li> <li>▪ Working with Macros</li> <li>▪ Forms and Form controls in Excel</li> </ul>
Word	<ul style="list-style-type: none"> <li>▪ Mail Merging</li> <li>▪ Document Commenting</li> <li>▪ Bookmarks</li> <li>▪ Master Documents</li> <li>▪ Recipient Lists</li> <li>▪ Tracking Changes</li> <li>▪ Indexing</li> <li>▪ Electronic Forms</li> <li>▪ Footnotes and Endnotes</li> <li>▪ Captions</li> <li>▪ Setting Word Options</li> <li>▪ Protecting Documents</li> <li>▪ Importing</li> <li>▪ Macros</li> </ul>
Powerpoint	<ul style="list-style-type: none"> <li>▪ PowerPoint Design Ideas</li> <li>▪ Animations</li> <li>▪ Slide Transitions</li> <li>▪ Work with Images, Videos</li> <li>▪ PowerPoint Notes for Presentation</li> <li>▪ Morph Transition</li> <li>▪ Charts</li> <li>▪ Videos editing</li> </ul>

### 3. Activities

Activity	Deliverables	Tentative timelines
Activity 1: Training module	Designed and developed a training module	22-24 Mar 2023
Activity 2: Training implementation	Conduct training in Advanced Microsoft office with the designed training module and training plan	22-24 Mar 2023

### 4. Consultant Team

The consultancy will be carried out by a team comprised of two-three consultants including at least one consultant with Microsoft Office Specialist (MOS) certification.

Oxfam staff will participate in orientation and key moments during the training sessions; provide detailed input and comments on relevant deliverables.

### 5. Qualifications:

The Consultant **Team** should demonstrate among others, the following qualifications and experiences:

- Have a profound understanding of the Microsoft office;
- Have profound and insightful knowledge about NPOs and NPO sector;
- Demonstrate proven skill in delivering adult training;
- Significant track record of previous similar study, training and coaching
- Have at least 10 years of experience in training and working with Microsoft office.

## **6. Budget:**

The applicant for the team leader should propose a consultancy proposal, specific methods for each activity and budget with a rate commensurate with experience as well as other related expenses for him to complete the task.

***To apply, please send a proposal (budget included), CVs and cover letter explaining your interest in the consultancy service to: [hr.vietnam@oxfam.org](mailto:hr.vietnam@oxfam.org) by 26 Mar, 2023.***

*Oxfam is committed to preventing any type of unwanted behavior at work including sexual harassment, exploitation and abuse, lack of integrity and financial misconduct; and committed to promoting the welfare of children, young people and adults. Oxfam expects all staff and volunteers to share this commitment through our code of conduct. We place a high priority on ensuring that only those who share and demonstrate our values are recruited to work for us.*

**We regret that only short-listed applicants will be contacted.**