STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT
TERMS OF REFERENCE

CONSULTANT FOR THE PROVISION OF TRAINING SERVICES IN
MICROSOFT EXCEL - BASIC, INTERMEDIARY AND ADVANCED (FIRM):
MEDIUM TERM RESULTS BASED BUDGETING

BACKGROUND

STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT

The Development Objective (PDO) of the Strategic Public Sector Transformation Project is to strengthen public resource management and support selected public sector institutions in facilitating a more enabling environment for private sector growth.

The Project is financed by a Grant of US$2.64M from the Department For International Development (DFID) and a Loan of US$35M from the International Bank for Reconstruction and Development (World Bank).

In implementing the Project the Government will advance its state administration to a level that is competitive at international standards. This is being done in order to achieve greater economic stimulation through efficiency in the Government's operations. The project will also have the benefit of improving service delivery to all Jamaicans, especially the most vulnerable and will benefit the private sector through greater ease and facilitation of business through a streamlined and accountable public sector.

The project is being implemented by the Ministry of Finance and Planning with the collaboration of the following Participating Agencies:

- The Planning Institute of Jamaica
- Jamaica Customs Agency
- The National Land Agency
- Bureau of Standards Jamaica
- Tax Administration Jamaica

Along with project management, the Project also has five components divided into two main thematic areas:
(a) Reinforcing Fiscal Discipline and Revenue Enhancement; and
(b) Public Sector Institutional strengthening to Remove Barriers that Impede Trade Facilitation.

The Activities of this consultant will be supported under Component 2 of the Project – Strengthening the Budget Preparation Process and Results Based Budgeting .

CAPACITY DEVELOPMENT FOR MEDIUM TERM RESULTS BASED BUDGETING (MTRBB)

In keeping with the objectives of the component, The Ministry of Finance and Public Service hired a consultant to develop the framework for the baseline forward estimates, Pilot MTRBB in at least three (3) Ministries, Department and Agencies and to develop an appropriate knowledge transfer mechanism to sustain the roll out of MTRBB.

In order to successfully and sustainably implement MTRBB Public Expenditure Division (PEX) staff and Ministries, Departments and Agencies (MDAs) will require additional training in order to complete assessment of budget and programme targets and indicators and to create the necessary templates and assessment tools to support evidenced based decision making on budgeting. To better determine the priority training needs of PEX and MDAs to implement MTRBB over the coming years, the Consultant worked with PEX to conduct a Training Needs Assessment (TNA) and subsequently developed a Training Plan based on the TNA results

The TNA conducted was based on a systematic approach that analysed performance gaps from an individual (worker), department (work) and organizational (workplace) perspective and provides targeted interventions to address identified performance gaps. One of the findings of the TNA is the need to provide basic, intermediary and advanced training in Microsoft Excel especially for the use and application of the "Forward Estimates Tool".

Medium term budgeting requires the creation of forward estimates in which out-year estimates are realistic and represent the future costs of existing policy. Results based budgeting integrates strategic planning with budgeting, and relies heavily on accurate and timely performance measurement.

OBJECTIVE OF THE ASSIGNMENT

The objective of this consultancy is the provision of training courses in Microsoft Excel Basic, Intermediary and Advanced with a qualified instructor and classroom style environment to at least 200 Public Sector Officers in Ministries Departments and Agencies. The training will increase the knowledge, skills and abilities of personnel in Microsoft Excel in order to improve their capacity in the development of reporting and the analysis of data for Medium Term Results Based Budget.

SCOPE OF WORK

In order to meet the objectives the consultant will be required to:
- Develop and implement a curriculum that covers the following areas:

BASIC TRAINING IN MICROSOFT EXCEL:

Module 1: Working with the spreadsheet model	• Identify worksheets and their contents • Describe the difference between workbooks and worksheets
Module 2: Basic data editing	• Describe processes for modifying cell contents and formats • Describe the process for inserting data with AutoFill • Identify when it is appropriate to use Paste Special
Module 3: Formula basics	• Explain the SUM function and describe how the formula is used • Explain other mathematical functions (AVERAGE, MIN, MAX) and describe how the formulas are used • Explain the COUNT functions and describe how the formulas are used • Describe the difference between relative and absolute cell references and identify when it is appropriate to use each • Describe processes for copying and pasting formulas and/or values • Explain how to handle formulas with dates
Module 4: Auditing worksheet	• Identify formula error indicators and steps required to solve errors

formulas	• Explain the process for tracing spreadsheet formula errors
Module 5: Acquiring and Conforming Data	• Describe methods for importing data from outside sources • Describe how to integrate data from other Excel sheets • Describe good practices for managing external links • Describe various tools and methods for finding and removing duplicate data points
Module 6: Excel tables and lists	• Explain how Excel tables work • Describe methods for converting text to columns • Describe methods and tools for sorting and grouping table data Describe how to add data in a table or list

INTERMEDIATE AND ADVANCED LEVELS IN MICROSOFT EXCEL

Module 1: Formula basics	o Explain the difference between relative and absolute cell references and identify when it is appropriate to use each o Describe the process for using formulas across worksheets o Explain how to conditionally summarize data o Explain what "nesting" means and use nesting expressions in formulas
Module 2: Intermediate Formulas	o Explain how to use the IF formula and create examples o Explain how to use VLOOKUP and HLOOKUP and create examples o Explain how to use INDEX and MATCH as alternatives to the VLOOKUP function and create examples
Module 3: Advanced Formulas	o Explain how to use the SUMIF formula and create examples o Explain how to use the COUNTIF formula and create examples o Explain how to use the IFERROR formula and create examples o Explain how to use the SUMIFS formula and create examples
Module 4: Advanced Formatting	o Describe how to enhance worksheets using themes o Describe methods for adding, editing, and deleting comments o Create Autofill lists o Convert data to a table for formatting
Module 5: Excel as a Database	o Describe methods for sorting data in Excel o Describe methods for filtering data to reduce dataset size o Describe methods for removing duplicate entries in the data o Describe methods for adding subtotals to a worksheet of data
Module 6: PivotTable Basics and Data Analysis	o Explain the uses of PivotTables for data analysis o Describe methods for creating a PivotTable with wizards o Describe the method for pivoting existing PivotTable data o Describe tools for formatting PivotTables o Describe the method for creating calculated fields in PivotTables
Module 7: Creating and managing macros	o Explain the uses and advantages of using macros o Describe methods for recording effective macros o Describe effective tools for launching macros (e.g., introducing buttons and user-friendly interfaces)

- Develop the required training material and provide participants manual
- In collaboration with the Project Manager in the Strategic Public Sector Project infuse aspects of the MTRBB methodology for forward estimates in the delivery of the training programme.

- Provide details on their approach to the delivery of the programme and how they will incorporate live public sector budget scenarios and simulations in the delivery of the training

- Administer Microsoft Excel training to 200 Public sector workers within the facilities of the institution/firm or alternative ideal training environment
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- Report on the learning outcome of participants and provide appropriate methodologies of the testing of competencies.

- Issue certificate of completion/ participation

COORDINATION/REPORTING RELATIONSHIP

The Consultant will report to and operate under the supervision of the Project Manager, Strategic Public Sector Transformation Project.

The Manager will co-ordinate the review and approval of the documents prepared by the Consultant.

CHARACTERISTICS OF THE CONSULTANCY

Type of Consultancy:	Consultant Firm
Procurement Method	Consultant Qualification
Duration of Contract	6 Months
Place of Work:	Jamaica
Type of Contract:	Fixed Price Contract
NB: The contract amount includes all costs related to undertaking the consultancy.	

DELIVERABLES

No.	Deliverables and Timelines	Percentage Weight
1.	Detailed Workplan outline the main activities and tasks to be undertaken during the implementation of the intervention	10 %
2.	Course outline and implementation methodology detailing: • General Course information • Learning outcomes • Course content • Instructional method • Course materials • Assignments and evaluation • Logistics and Scheduling	20 %
3.	Progress Report 1 - detailing the operations	-

	of the programme to include: • No of participants registered in Basic and Intermediary Levels • Evaluation Scores • Issues and Recommendations • No of participations certified	
3	1. Progress Report 2- detailing the operations of the programme to include: • No of participants registered in Basic and Intermediary Levels • Evaluation Scores • Issues and Recommendations • No of participations certified	**15 %**
4	1. Progress Report 3- detailing the operations of the programme to include: • No of participants registered in Basic and Intermediary Levels • Evaluation Scores • Issues and Recommendations • No of participations certified	**15 %**
5	2. Progress Report 4- detailing the operations of the programme to include: • No of participants registered in Basic and Intermediary Levels • Evaluation Scores • Issues and Recommendations • No of participations certified	**20%**
6.	Final Report detailing the outputs of the training with the relevant recommendations for future engagement.	**20%**

The Consultant Training Firm shall:
- Be an accredited Microsoft Learning Partner.
- Have at least 5 years of experience in developing and delivering Microsoft excel training.
- Have provided at least 5 courses in the requested product area.

K1 - Team Leader proposed by the Consulting firm should meet the following requirements:

- Bachelor's Degree in Computer Science, Computer Applications or Social Science Discipline
- Have managed at least two programmes of a similar nature
- Have experience in delivering similar programs to public and /or private sector organization's Trainers must be able to provide evidence of number of similar courses delivered in English.

K2 - Trainer proposed by the Consulting firm should meet the following requirements:
- Bachelor's Degree in Computer Science, Computer Applications or Social Science Discipline
- Have conducted training in at least three programmes of a similar nature
- Have accreditation in delivering Microsoft training in Excel

EVALUATION

The Consultant Training Firm shall:	**70**
• *Be an accredited Microsoft Learning Partner.*	– 40
• *Have at least 5 years of experience in developing and delivering Microsoft excel training.*	– 20
• *Have provided at least 5 courses in the requested product area.*	– 10
K1 - Team Leader proposed by the Consulting firm should meet the following requirements:	**20**
• *Certificate or Training in Computer Science, Computer Applications or Social Science Discipline*	– 2.5
• *Have delivered a minimum of 8 classes in Microsoft Excel*	– 7.5
• *Have experience in delivering similar programs to public and /or private sector organization's Trainers must be able to provide evidence of number of similar courses delivered in English.*	– 10
K2 - Trainer proposed by the Consulting firm should meet the following requirements:	**10**
• *Bachelor's Degree in Computer Science, Computer Applications or Social Science Discipline*	– 2
• *Have conducted training in at least three programmes of a similar nature*	– 3
• *Have accreditation in delivering Microsoft training in Excel*	– 5