



We are looking for an Excel Expert to develop Custom Workbooks

Can help us create custom workbooks that make tracking costs a breeze for our charity? We need someone who can design user-friendly, efficient tools tailored to fit our unique financial and operational needs.

About Us

Age UK Mid Mersey (AUKMM) is a local independent charity, working with 2000+ people aged 50+ each year, living in the boroughs of Halton, St. Helens, Warrington, and Knowsley.

Although we are a brand partner of Age UK, we source our own funding and set our own services.

To ensure that our charity is more financially secure and we get the most out of funding grants it is essential that we are able to build full cost recovery in to our projects.

What is Full Cost Recovery?

Full cost recovery means you include all costs, both direct and a proportionate share of indirect costs (our charity overheads), that it will take to run a project/deliver a service.

For example:

Direct costs – all expenses directly related to the project. This may include project staff, employer costs such as National Insurance contributions, employer pension, and any pay raises, and activity costs such as room hire/rent, postage, IT equipment, etc.

Indirect costs – these are costs that are not directly attributable to the project but should still be included in costing proposals. For example, back office staff, i.e., admin or finance teams, building rent, utilities, rates, repair and maintenance, insurance, administration costs, etc. There's also the possibility to include a proportion of legal and professional fees, bank charges, accountancy fees, government costs, IT support costs, and more.

Deliverables

- Fully functional and customised Excel workbooks.
- User guide/documentation for the workbooks.
- Post-implementation support for a specified period (e.g., 1 month) to address any issues or updates.

Scope of Work

The Excel specialist will be required to:

- Design Custom Workbooks: Develop intuitive, automated workbooks that calculate full cost recovery, incorporating direct costs, indirect costs, and shared overheads.
- Tailor to Our Needs: Adapt the workbook structure to our specific activities, funding streams, and reporting requirements.
- Include Automation: Use formulas, pivot tables, and macros to automate repetitive tasks and minimise manual input errors.
- Integrate Features: Provide features such as:
 - Allocation of overheads across different projects or services.
 - Budget tracking and forecasting tools.
 - Graphical dashboards for presenting data insights.
- Ensure Usability: Ensure the workbooks are user-friendly and provide clear instructions for use.
- Testing and Feedback: Work closely with our Senior Team and Finance team to test the workbooks and incorporate feedback for refinement
- Training: Provide a brief training session or documentation to ensure our finance team can use the workbooks effectively.

Qualifications or experience required

- Proven experience in Excel development, including advanced formulas, pivot tables, and VBA/macros.
- Prior experience working with charities or non-profit organisations is highly desirable.
- Strong analytical and problem-solving skills.
- communication skills to ensure smooth collaboration.

Time Line

The project must be completed within 4 weeks from the start date.

Budget

Please provide a detailed quote outlining your fees and any associated costs.

How to Apply

If you are interested, please send us:

- 1) A brief introduction about yourself and your relevant experience.
- 2) Examples of similar projects you've completed (if available).
- 3) Your proposed approach to this project.
- 4) A cost estimate and timeline.

**Send your expression of interest to shelleybrown@aukmm.org.uk by 2nd February 2025.
For an informal discussion about the commission please email requesting a call back .**