

TECHNICAL EVALUATION CRITERIA - RFP 08/2021 - TAX TECHNICIAN QUALIFICATION FOR SARS (NQF 6)

COMPANY NAME :

#	Technical Evaluation Criterion	Weight 100 points	Guideline	Ref	Score
1	Profile, Infrastructure & Facilitators/ Lecturers	17		9.3.10	
1.1	<p>The service provider have submitted in their response:</p> <ul style="list-style-type: none"> The Institutions profile detailing the number of years in delivering training on the knowledge and practical skills components of the Tax Technician Qualification. The profile must also include but not limited to: staff complement (including lecturers and course convener(s) for the qualification. 	6	<ul style="list-style-type: none"> • 6 = The service provider have submitted a profile demonstrating more than 5 years of experience in delivering the Tax Technician Qualification and included the staff complement (lecturers and course conveners) for the qualification. • 4 = The service provider have submitted a profile demonstrating more than 5 years of experience in delivering the Tax Technician Qualification but did not include the staff complement (lecturers and course conveners) for the qualification. • 3 = The service provider have submitted a profile demonstrating less than 5 years of experience in delivering the Tax Technician Qualification and included the staff complement (lecturers and course conveners) for the qualification. • 2 = The service provider have submitted a profile demonstrating less than 5 years of experience in delivering the Tax Technician Qualification but did not include the staff complement (lecturers and course conveners) for the qualification. • 0 = No information provided. 		
1.2	<p>The service provider have submitted:</p> <ul style="list-style-type: none"> The Institution's infrastructure to deliver training e.g. Ms Teams, Webex or Zoom. 	5	<ul style="list-style-type: none"> • 5 = The service provider has provided information on their Institution's infrastructure to deliver virtual contact training session(e.g. Ms Teams, Webex or Zoom ect). • 0 = No information provided. 		
1.3	<p>The service provider have demonstrated the assigned Facilitators or Lecturers accessibility to the following:</p> <ul style="list-style-type: none"> Laptop or tablet cell phone and Access to the internet. 	6	<p>The facilitators or lecturers assigned to the project have access to the following :</p> <ul style="list-style-type: none"> • 2 = Laptop or tablet • 2 = Cell phone and • 2 = Access to the internet. • 0 = No information provided. 		
2	Resources	19		9.3.11	
2.1	<p>The service provider have submitted information on the following:</p> <ul style="list-style-type: none"> One (1) page Curriculum Vitae (CV) indicating the level of expertise of the facilitators/ Assessors that will be delivering training on the knowledge and practical skills components. The proposed Facilitators and Assessors must have a recognised NQF level 8 qualification in the field of taxation/accounting/audit. A minimum of five (5) years' experience in the subjects listed in the Tax Technician curriculum document. Membership in good standing with a professional body in the field of taxation/accounting/audit. <p>NB: The service provider to attach the certified copies of NQF level 8 qualification on taxation/accounting/audit.</p>	15	<p>The service provider have submitted:</p> <ul style="list-style-type: none"> • 5 = Proof of the Facilitators and Assessors' recognised NQF level 8 qualification in the field of taxation/accounting/audit (NB Certified copies attached); • Facilitators and Assessors have a years' experience in the subjects listed in the Tax Technician curriculum document; • Evaluation Guide for facilitators/ Assessors years of experience 5 = Facilitators and Assessors have 5 years of experience or more 4 = Facilitators and Assessors have 4 years of experience 3 = Facilitators and Assessors have 3 years of experience 2 = Facilitators and Assessors have 2 years of experience 1 = Facilitators and Assessors have 1 year of experience 0 = Facilitators and Assessors do not have experience in the subjects listed in the Tax Technician Curriculum • 5 = Proof of the Facilitators and Assessors membership in good standing with a professional body in the field of taxation, accounting or audit, e.g. The South African Institute of Chartered Accountants (SAICA), The South African Institute of Tax Professionals (SAIT) The South African Institute of Professional Accountants (SAIT), The Association of Chartered Certified Accountants (ACCA). = • 0 = No information provided 		
2.2	<p>The service provider have submitted:</p> <ul style="list-style-type: none"> Full contact details (landline, cell-phone and email address) of a Key Account Manager, who will be assigned to SARS including: His/her role and responsibilities when the services are rendered to SARS; A minimum of five (5) years of experience as a Key Account Manager; and One page CV, containing his/her qualifications (certified copies of certificates). 	4	<p>The service provider have submitted:</p> <ul style="list-style-type: none"> • 4 = A key account manager's full contact details (1), roles and responsibilities (1), minimum of 5 years' experience (1) and certified copies of qualifications (1). • 0 = No information provided. 		
3	Learner Selection	6		9.3.1	
3.1	<p>The service provider have demonstrated by providing screenshots of the following:</p> <ul style="list-style-type: none"> The online learner application system that will ensure all applicants are subjected to screening and assessment process required to shortlist and select final list of suitable candidates for entry into the qualification. The ability to submit detailed screening and/or assessments reports to SARS. The ability of the online learner application system to accommodate one hundred (100) delegates to be selected for enrolment. 	6	<p>The service provider have:</p> <ul style="list-style-type: none"> • 2= Indicated in the screenshot the online learner application system and its functions (screenshots) • 2 = Screenshots indicating the screening and assessment process flow to shortlist suitable candidates. • 1 = Samples of screening and/or assessment reports. • 1 = Provided information on online application system that have the ability to accommodate one hundred (100) delegates to be selected for enrolment. • 0 = No information provided 		
4	Online Student Support Portal	2		9.3.2	
4.1	<p>The service provider have submitted evidence of:</p> <p>An online student support portal where all successful applicants, up to one hundred (100) will have access to.</p> <ul style="list-style-type: none"> The portal that is capable of making learning resources, (e.g. learning material, additional learning/reference material and lesson or additional explanatory recordings, communications, etc.) accessible to learners. 	2	<p>The service provider have submitted:</p> <ul style="list-style-type: none"> • 2 = screenshots of an online student support portal where 100 enrolled students will have access to, demonstrating on the following: Accessibility of Learning resources (e.g. learning material, additional learning/reference material and lesson or additional explanatory recordings, communications, etc.) • 0 = No information provided 		
5	Layout of the Tax Technician Qualification Curriculum	5		9.3.3	
5.1	<p>The service provider have submitted a layout of the following six (6) knowledge components which they will provide academic support for and in line with the tax technician qualification curriculum:</p> <p>Deliver training on the following knowledge modules as listed below:</p> <ul style="list-style-type: none"> General Tax Fundamentals, NQF Level 6, Credits 48; Personal Income Taxation, NQF Level 6, Credits 24; Employment Payroll Taxation, NQF Level 5, Credits 16; Corporate Income Taxation, NQF Level 5, Credits 24; Value-added Tax, NQF Level 5, Credits 32; and Tax Administration and Practice Management, NQF Level 5, Credits 16. 	3	<ul style="list-style-type: none"> • 3 = The service provider have submitted a layout of the six (6) knowledge components which they are required to provide academic support for and in line with the tax technician qualification curriculum. • 0 = The service provider have submitted a layout of less than six (6) knowledge components which they are required to provide academic support for and in line with the tax technician qualification/ not in line with the tax technician qualification or No information provided. 		
5.2	<p>The service provider have submitted a layout of the following four (4) practical skills components which they will provide academic support for and in line with the tax technician curriculum qualification:</p> <p>Deliver training on the following practical skills modules as listed below:</p> <ul style="list-style-type: none"> Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Personal Income Taxation, NQF Level 6, Credits 60; Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Employment Payroll Tax Returns, NQF Level 5, Credits 20; Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Corporate Income Taxation, NQF Level 6, Credits 60; and Compliance, Ancillary Explanations and Revenue Authority Engagement / Taxpayer Related to Value-Added Taxation, NQF Level 5, Credits 60. 	2	<ul style="list-style-type: none"> • 2 = The service provider have submitted a layout of the four (4) practical skills components which they are required to provide academic support for and in line with the tax technician qualification curriculum. • 0 = The service provider have submitted a layout of less than four (4) practical skills components which they are required to provide academic support for and in line with the tax technician qualification/ not in line with the tax technician qualification or No information provided. 		
6	Initial Test of Competence (ITC)	2		9.3.4	

6.1	<ul style="list-style-type: none"> The service provider must explain how they will ensure that all delegates/ students subjected to a preparatory course are adequately prepared for the initial test of competence (ITC); and Conduct/administer the initial test of competence (ITC). 	2	<p>The service provider have explained the process that will be followed to ensure that all delegates subjected to the ITC have:</p> <ul style="list-style-type: none"> 1 = Received, read and understood the initial test of competence rules and regulations/ guidelines 1 = Received, read and understood the assessment policy 0 = No information provided. 		
7	Supervisor Training	3		9.3.6	
7.1	<ul style="list-style-type: none"> The service provider should submit a training plan for the supervisors, propose the number of hours that the nominated supervisors should commit and outline their roles and responsibility in ensuring that logbooks are completed in line with the curriculum document. 	3	<p>The service provider have submitted the following:</p> <ul style="list-style-type: none"> 1 = Training plan for the supervisors training 1 = Proposed the number of hours 1 = Roles and Responsibilities of the supervisors 0 = No information provided. 		
8	External Integrated Summative Assessment	2			
8.1	<ul style="list-style-type: none"> The service provider should explain the process they will follow to ensure that all delegates who were found competent on the ITC have completed their logbooks and are adequately prepared for the EISA. 	2	<p>The service provider has explained the process that will be followed to ensure that all delegates who were found competent on the ITC are subjected to a preparatory course and have</p> <ul style="list-style-type: none"> 1 = Received, read and understood the EISA rules and regulations/ guidelines 1 = Received, read and understood the assessment policy 0 = No information provided. 		
9	Liaison With The SAIT	4		9.3.8	
9.1	<ul style="list-style-type: none"> The service provider should explain how they will act as liaison between SARS and the SAIT with respect to the selection of a sample of logbooks which must be assessed by the SAIT for compliance with the QCTO standards. The Service provider should explain how they will facilitate the registration of delegates with the SAIT for the EISA. 	4	<p>The service provider have explained how liaison between SARS and the SAIT will be conducted with regard to the following mode of communication in communicating and coordinating activities in respect to the selection of logbooks that will be assessed by the SAIT for compliance with the QCTO standards and the facilitation of the registration of delegates with the SAIT for the EISA:</p> <ul style="list-style-type: none"> 1 = Frequency of the face to face communication taking into consideration the Covid 19 Regulations; 1 = Frequency of the telephonic/ emails communication; 1 = Frequency of the virtual meeting and 1 = Frequency of the report 0 = No information provided 		
10	Methodology and Approach	29		9.3.10	
10.1	<p>The service provider have submitted information on how they will launch orientation for the academic programme will be conducted including but not limited to:</p> <ul style="list-style-type: none"> Qualifications objectives; Criteria; Method of assessment; and Relevant information to the nominated SARS delegates. 	9	<p>The service provider have submitted information on how the launch orientation for the academic programme will be conducted including but not limited to:</p> <ul style="list-style-type: none"> 3 = Qualifications objectives 3 = Criteria 3 = Method of assessment and relevant information to the nominated SARS delegates 0 = No information provided. 		
10.2	<p>The service provider have submitted:</p> <p>A high-level delivery plan that clearly outlines the following:</p> <ul style="list-style-type: none"> The deliverables including reporting, facilitators/assessors and the timelines for the delivery of the training. All SARS's key requirements/ Activities as outlined in paragraph 9.3.1 & 9.3.10. 	20	<p>The service provider have submitted A high level delivery plan demonstrating the bidder's recommended timeline including:</p> <ul style="list-style-type: none"> 4 = Deliverables 4 = Timelines 4 = Reporting 4 = Facilitators/ Assessors 4 = Key requirements/ Activities (e.g. curriculum) 0 = No information provided 		
11	Recognition of Prior Learning (RPL)	2		9.3.9	
11.1	<ul style="list-style-type: none"> The service provider should submit the RPL policy and demonstrate through an explanation of how the RPL of identified students, taking into account their number of years of experience and previous qualifications, will be conducted. 	2	<p>2 = The service provider has submitted the RPL policy and has demonstrated through an explanation on how the RPL of identified students will be conducted, and have take into account the number of years of experience and previous qualifications</p> <ul style="list-style-type: none"> 0 = No information provided 		
12	Testimonials	9		9.4.3	
12.1	<p>The service provider have submitted three (3) testimonial letters from current/recent clients/individuals, (not older than 5 years) to whom the delivery of the knowledge and practical skills component of the Tax Technician Qualification were rendered.</p> <p>The testimonial letters must be on a company letter head if an organisation was serviced or without a letter head if an individual was serviced and include but not be limited to:</p> <ul style="list-style-type: none"> Company name/ individual name/ Company representative name; Address, phone number; Duration of the contract; A brief description of the services; and Level of customer satisfaction. <p>NB:Please note that SARS will contact the clients for reference check. Bidders must ensure that the client contact provided is contactable.</p>	9	<p>The service provider have submitted three (3) testimonial letters from current/recent clients/individuals, (not older than 5 years) to whom the delivery of the knowledge and practical skills component of the Tax Technician Qualification were rendered.</p> <p>Three (3) points per letter will be distributed as follows:</p> <ol style="list-style-type: none"> Company name/ Individual name, Company representative name, address, phone number and duration of the contract = 1 A brief description of the services rendered = 1 Level of satisfaction of the services rendered = 1 <p>Evaluation guide for level of satisfaction:</p> <p>Good = 1 Average = 0.5 Poor = 0</p> <ul style="list-style-type: none"> 0 = Testimonial letters not relevant to the scope of work or no information provided 		
	TOTAL	100			